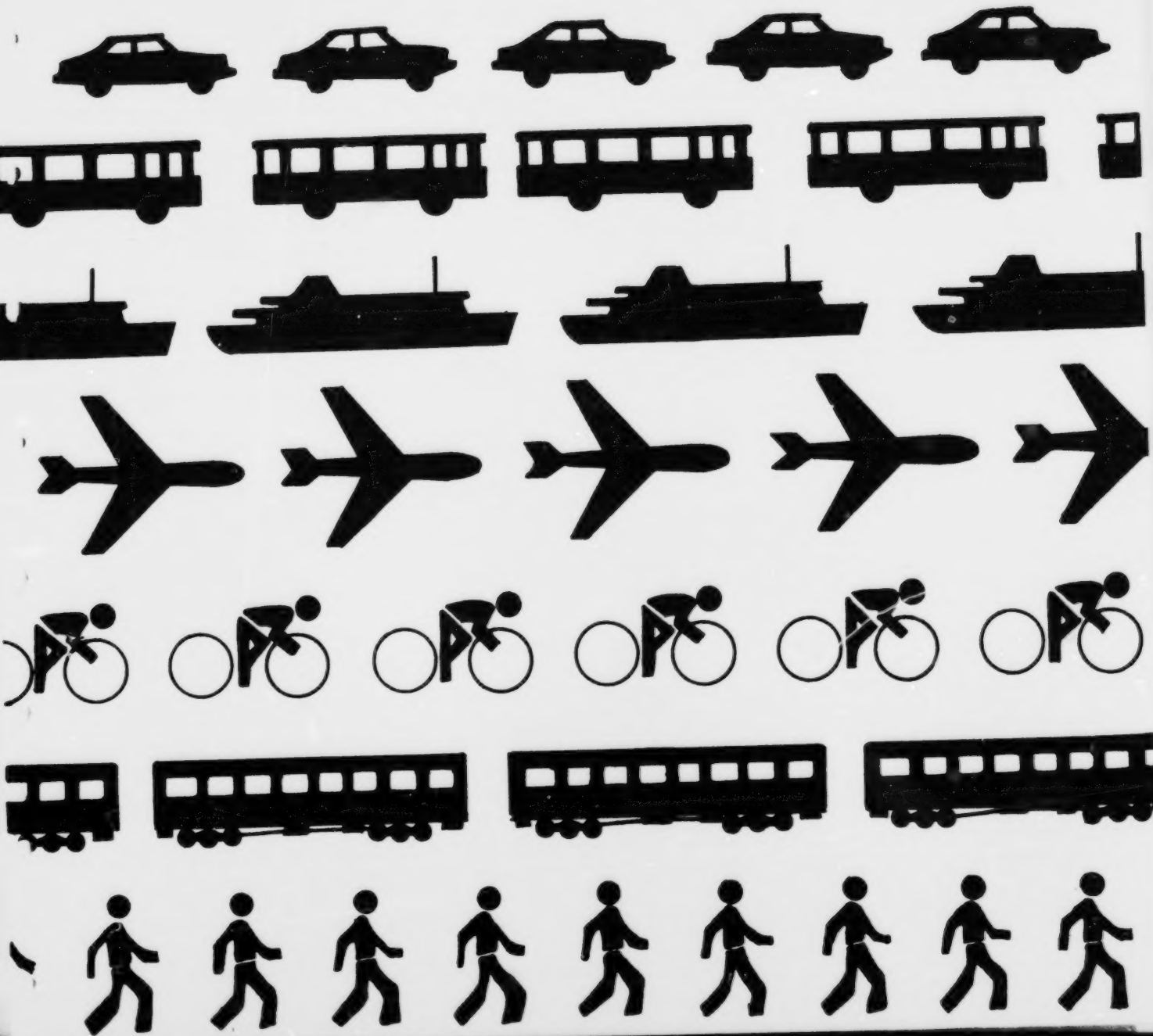
a tourist sector strategy for new brunswick



FOREWARD

August 27, 1982

1. This publication is issued on the direction of the Minister and Deputy Minister of Tourism and in cooperation with the tourism industry of the Province of New Brunswick.

2. The publication is effective upon receipt.

3. Suggestions for amendments should be forwarded to:

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A TOURIST SECTOR STRATEGY FOR NEW BRUNSWICK

RECORD OF AMENDMENTS

Identification of AL*		Date Entered	By Whom Entered Name:
AL* Number	Date		

*AL means Amendment List

TABLE OF CONTENTS

1. INTRODUCTION 1-1

2. EXTERNAL FACTORS AFFECTING THE TOURISM INDUSTRY .. 2-1
   - 2.1 Introduction 2-1
   - 2.2 Energy 2-1
   - 2.3 Economy 2-4
   - 2.4 Population and Labour Force 2-6
   - 2.5 Changing Values 2-8
   - 2.6 Political Factors 2-9
   - 2.7 Summary 2-10

3. NEW BRUNSWICK OVERVIEW 3-1
   - 3.1 Components of Tourism 3-1
     - 3.1.1 Attractions 3-1
     - 3.1.2 Services/Facilities 3-3
     - 3.1.3 Human Resources 3-3
     - 3.1.4 Market Factors 3-3
     - 3.1.5 Marketing 3-4
     - 3.1.6 Transportation 3-5
   - 3.2 Demand 3-6
     - 3.2.1 Visitor Demand 3-7
     - 3.2.2 Mode of Travel 3-9
     - 3.2.3 Seasonality 3-9
     - 3.2.4 Market Origins 3-10
     - 3.2.5 Areas Visited 3-12
     - 3.2.6 Purpose of Visit 3-15
     - 3.2.7 Industry Sales 3-15

3.3 Supply 3-17
3.3.1 Attractions 3-17
3.3.2 Services/Facilities 3-20
3.3.3 Human Resources 3-23
3.3.4 Transportation 3-23
3.3.5 Marketing 3-25

4. ADDITIONAL ISSUES AND CONCERNS 4-1
4.1 Competition 4-1
4.2 Image 4-2
4.3 Price/Quality 4-4
4.4 Seasonality 4-5
4.5 Other Issues 4-7
4.5.1 Low Cost Accommodation 4-7
4.5.2 Resident-Visitor Relationships 4-8
4.5.3 Lack of Developed and Promoted Destination Areas 4-8
4.5.4 Land Availability 4-9
4.5.5 Transportation 4-9
4.6 Summary 4-9

5. OBJECTIVES OF STRATEGY 5-1
5.1 Introduction 5-1
5.2 The Destination Area Approach 5-5

6. PROGRAMS AFFECTING DEMAND 6-1
6.1 Introduction 6-1
6.2 Market Research 6-3
6.3 Advertising 6-6
6.4 Travel Trade Development 6-9
6.5 Telephone Information/Reservation System 6-12
6.6 Literature and Editorial Services 6-14
6.7 Tourist Information Centres 6-17
6.8 Signs 6-20

7. PROGRAMS AFFECTING SUPPLY 7-1
7.1 Introduction-Framework 7-1
7.2 Park System 7-2
7.3 Transportation System 7-7
7.4 Attractions Development 7-9
7.5 Financial Assistance 7-13
7.6 Technical Assistance 7-17
7.7 Standards 7-19
7.8 Training 7-20

8. OTHER PROGRAMS 8-1
8.1 Industry Representation 8-1
8.2 Awareness Program 8-4
8.3 Special Events 8-6

9. SUMMARY OF RECOMMENDATIONS 9-1

LIST OF DIAGRAMS

Diagram	Title	Page
3.1	Components of Tourism	3-2
3.2	Vehicles vs. Visitors	3-8
3.3	Percent Distribution by Month	3-10
3.4	Visitor Profile by Origin	3-11
4.1	Productivity/Price Inter-Relationships	4-6
5.1	Objectives	5-4
5.2	Illustration of Destination Area Approach	5-11
6.1	Vacation/Selling/Planning	6-2
7.1	Park System in New Brunswick	7-4
9.1	Problems/Objectives/Recommendations	9-2
9.2	Summary of Recommendations	9-3

LIST OF MAPS

Map	Title	Page
3.1	Non-Resident Auto Traffic Flow-Summary 1977	3-13
3.2	Distribution of Non-Resident Party Nights By Area	3-14
3.3	Attractions	3-18
3.4	Recreation Capability	3-18
3.5	Roofed Accommodation	3-21
3.6	Campgrounds	3-21
3.7	Transportation Facilities	3-24
3.8	Tourist Information Centres	3-24
5.1	Tourist Regions and Destination Areas	5-9

OVERVIEW
and
ASSESSMENT

CHAPTER 1
INTRODUCTION

The emergence of tourism as a growth industry of international significance requires clear strategic approaches to guide both government and the private sector in (a) taking advantage of development opportunities and (b) removing constraints to full industry growth.

Recent trends clearly indicate that competition for the tourist is ever increasing. The tourist client is more sophisticated in his demands, has far greater vacation alternatives and demonstrates constantly changing values and vacation preferences. In the last several years the industry has also had to contend with added pressure from uncertain economies and the emergence of energy supplies as a major consumer issue.

Because of the demonstrated importance of tourism to the New Brunswick economy in terms of jobs and income for provincial residents, a coordinated development approach for the mid-term is required. This strategy is intended to provide that guidance through the provision of

(a) an overview of the existing tourism industry in New Brunswick
(b) projection of future trends in the industry
(c) an action plan for government and the private sector.

More particularly, the strategy examines opportunities and problems and makes recommendations for tourism industry development in New Brunswick to 1986. Trends and conditions in other areas are reviewed where they have market or other impacts on the industry in New Brunswick.

This strategy is primarily concerned with the economic aspects of tourism development. The emphasis, while not disregarding social, environmental or cultural considerations, is oriented towards the contribution which the industry presently makes and can make to the economy of New Brunswick. Detailed analysis is given to certain programs such as advertising or technical assistance, which relate directly to the stimulation of either supply or demand and which directly affect the industry's well-being.

During the formulation of this strategy input was obtained from a wide variety of sources. In recent years, five regional tourism plans involving considerable public sector involvement have been completed. Their analysis and recommendations have made valuable contributions to this overall provincial document. Research, such as air, tour bus and auto surveys, a visitor satisfaction study, a domestic travel survey ard a tourist information centre visitor survey, has provided important insights into changing tourist needs and demands. Representations from the industry through the Tourism Advisory Council, Hospitality New Brunswick and other organizations have also been considered. Numerous reports and articles oriented to the future of the industry were also consulted.

The strategy is intended to cover the five years 1982 through 1986 although several of its key recommendations extend beyond this time period. The recommended courses of action in the strategy are considered to be fundamental to tourism industry viability. Nevertheless, it is not within the Department's mandate to assume that a financial committment sufficient to undertake each of these initiatives will be forthcoming. For government sponsored actions, this will depend on government policies and priorities over the period concerned. Other components will depend on private sector initiative.

CHAPTER 2
EXTERNAL FACTORS AFFECTING THE TOURISM INDUSTRY

2.1 Introduction

This chapter examines the most important external factors which we feel will have significant impacts on the industry over the next few years. It indicates a probable scenario for the future and the implications for the tourism industry.

Five major external factors have been identified:

- energy — Primary Importance
- economy — Primary Importance
- population and labour force — Secondary Importance
- changing values — Secondary Importance
- political factors — Secondary Importance

2.2 Energy

The availability or perceived availability of fuel supplies has obvious impact on the tourism industry. As a result, the assumptions respecting energy and fuel over the next few years are of key importance to the strategy.

The United States setback due to oil embargoes during the fall of 1973 greatly affected automobile travel. The "big freeze" of 1977 which affected United States production and employment also had important energy and

travel implications. Recent disturbances in the Middle East have again demonstrated the vulnerable nature of oil supplies. Shortages and perceived shortages, while quickly forgotten and impossible to predict, are a definite factor in the future of travel.

Over the strategy period, tighter supplies of oil-based energy are anticipated. Canada will become less self-sufficient in energy, while oil prices here will move towards world levels. Large increases in the cost of natural gas, electricity and coal are foreseen. In addition, alternate energy systems will be the subject of increased development efforts. However, it is not anticipated that the benefits of these efforts will be felt on a large scale by the mid-eighties.

Government concern for energy conservation will continue to increase, which may be to the benefit of the tourism industry. By encouraging the production and sale of energy-efficient automobiles, government positively affects the availability and cost of fuel for travellers. As a result the automobile is expected to retain its dominance for New Brunswick as the major form of vacation travel. The largest improvements in average automobile fuel-efficiency are expected to occur in the early 1980's.

Increased transportation costs will cut into automobile travel from our more distant markets. The

tendency toward shorter distance travel and greater length of stay will increase our share of close-to-home markets and will offset any decreased travel from distant markets.

Increased travel costs will facilitate the marketing of New Brunswick to provincial residents as an alternative to leaving the Province.

In addition, increased transportation costs will encourage the use of mass transit travel. Tour buses will benefit as evidenced by the tremendous increase in tour bus traffic from 1976 to 1981. This mode of travel has benefited greatly and is expected to continue to grow in the 1980's. Air and rail traffic in New Brunswick will not be affected significantly by energy. Their future growth will be more affected by factors other than fuel availability such as the availability of seats, customs clearing facilities and location of terminals. Rail travel will grow as a result of increased emphasis on passenger services, higher quality facilities and package tour development.

In summary, energy availability and cost will affect and, in many ways, shape the nature and type of discretionary travel in the 1980's.

2.3 Economy

During the early 1980's, fluctuating improvements in the Canadian economy are predicted, with the emphasis on slow recovery. Although concerned with high unemployment rates, governments will continue to be constrained by their fiscal situations and continued inflationary pressures. Consequently fiscal restraint is expected to be maintained over this period.

For the period of 1982 to 1985, the economy is uncertain, and only fractional improvements are expected in unemployment and prices. It would appear, respecting inflation and unemployment, that the early 1980's will not be as bright as the early 1970's.

The period to 1986 is not expected to include massive shifts in the economic fabric, with neither boom nor depression anticipated. One definite departure from this scenario is the current recessionary period which will probably stretch through 1982.

In summary and referring again to the Canadian situation, increases in incomes and expenditures in the 1980's will be at a rate of growth less than the recent past. The effect on tourism is that there will not be dramatic

increases in the numbers traveling, or in expenditures made as a result of the growth of their incomes. The anticipated growth in real incomes per capita and in expenditures should be approximately 2% per annum. Growth in real tourism on an annual basis should be in the same order of magnitude.

In terms of tourism, those economic factors directly linked to energy will continue to be the most important. Accurate monitoring of these factors and responding to them as quickly as possible will be fundamental to industry success over this period.

From 1975 to 1978 Canada's travel account balance of payments deteriorated rapidly, especially with respect to the U.S. where a long period of surpluses has turned into one of much larger deficits. This occured when Canadians demonstrated a greater propensity to travel outside Canada at the same time that others have shown a lesser propensity to visit here. In 1979, a marked improvement in the balance of travel payments occurred.

That shift in travel patterns was related, in part, to more rapid increases in travel prices in Canada than in the U.S. The tourism situation paralleled those in other industries as the Canadian economy became increasingly non-competitive. Accordingly downward pressures on the Canadian dollar led to a realignment of currency values. In 1977 and 1978 the cost of travel in Canada improved relative to that in the United States.

The recent depreciation of the Canadian dollar relative to that of the United States has benefited and will continue to benefit the tourism industry in Canada. The impact has tended to lag behind the depreciation reflecting the time it takes for visitors to become aware of the differential. Present indications are that the Canadian dollar will remain weak relative to the American dollar. While some improvement in Canada's overall export position has and will accrue to the devaluation, continued deficits in the travel account are anticipated at least through 1983.

In summary, any increased demand for tourism services over this period will not be in response to a growth economy but will depend on other special efforts by government and industry.

2.4 Population and Labour Force

Over the next five years, Canada's population is expected to increase at a rate of about 2% per annum. A general upward shift in age structure will have the effect of increasing the 20 to 44 years and the 65 plus age bracket.

Trends towards shortened work weeks, coupled with, increased contractual and statutory holidays will increase leisure time in the future even though the trend toward earlier retirement is at a critical changing point. More significantly, however, the rate of increase in leisure time will be largely unchanged from recent years. The impact on the rate of growth of tourism will be minimal.

In general, shifts in population toward faster growing regions, and the overall rural to urban shift are anticipated to have negligible effects on tourism in the Province.

The upward shift in age structure is expected to have a positive, but moderate effect on tourism in New Brunswick. The increase in the 20 to 44 age group may be reflected in shifts in demand for services and attractions. For example, beaches may increase in importance and demand.

Earlier retirement ages and increased numbers in the 65 plus age group will likely result in an increased volume of travel for this age group. Increased demand for services and activities oriented toward an older market will result.

2.5 Changing Values

The overall status of women can be expected to increase. Most significantly, this increased status will be manifested in increased labour force participation rates, and particularly in professional and managerial careers. Women's salaries are expected to become comparable to that of similarly employed men.

Increased value is being placed on individual identity and developing knowledge and skills when selecting leisure time activities. Movement away from materialism as a means of self-fulfillment and increased emphasis on aesthetic and environmental values will tend to lead to stronger regulations for pollution and protection of the environment.

The above trends, combined with an increased demand (in travel) for quality and personalized service will increase demand for diversification and quality of the tourism plant.

An expected increase in quality vacations will lead to a trend from passive sightseeing toward more personal involvement and experience. Tourists will tend to concentrate in destination areas seeking greater activity within that area as opposed to random travel. Although this will merit the development of additional plant in some areas, it definitely will demand the upgrading of the existing plant in all areas. Increased awareness among travellers will result in a demand for a wider variety of attractions and cultural and educational experience.

Tourists are expecting a higher quality product, and the industry's success in New Brunswick will depend largely on our ability to provide a quality product. Any increase in the average length of stay of tourists will depend as much (if not more) on the quality of accommodations as on availability. The tourist, whose transportation costs will be continually increasing, will expect to travel less, but see more. He will expect to pay for quality products, but will be less inclined to accept an inferior product, even at a slightly lower price. For example, New Brunswick handcrafts, although costing more than mass produced souvenirs, are a successful product because they are authentic and of high quality. The demand for better restaurants and authentic traditional foods will increase. Fast food chains providing reliably high quality food at reasonable prices will continue to be successful. Tourists will increasingly demand value for their dollar.

Changing values of the tourism market, if monitored and anticipated, can represent a potential opportunity for tourism in New Brunswick. Ignoring these changes can be detrimental.

2.6 Political Factors

National and international political events can swiftly influence travel patterns either positively or negatively. As a vacation destination Canada is fortunate to be viewed as a relatively stable and friendly place to visit unlikely to suffer such disruptions. In addition there is potential for greater awareness and nationalism in Canadians leading to greater resident travel. As a side benefit travel can serve as an important unifying force within and among countries.

2.7 Summary

Most of the factors described in this chapter indicate that tourism growth over the strategy period will be slower than past rates of growth. Energy and employment/ inflation issues will be the key factors affecting the overall growth of the industry.

Beyond the period of the strategy, the situation is more encouraging. As the economy improves and real incomes rise; as an increasing population gains more leisure time and takes a greater interest in self development, travel will become increasingly popular and demand will show a more healthy growth rate.

During the strategy period there will tend to be important shifts in travel patterns. People will not travel as far by automobile to vacation nor will they tend to travel around as much during their stay. They will seek to travel less and see more by choosing vacation locations that offer a variety of things to do within a concentrated area.

The automobile will still be the dominant mode of travel for New Brunswick visitors.

More tourists will seek out learning experiences and activities in their vacation and attempt to learn both more about the life styles of their hosts and their environment. Interpretation and interpretive facilities will become more important.

Changes both in travel volume and type of demand will be important to the tourism industry of New Brunswick over the next few years.

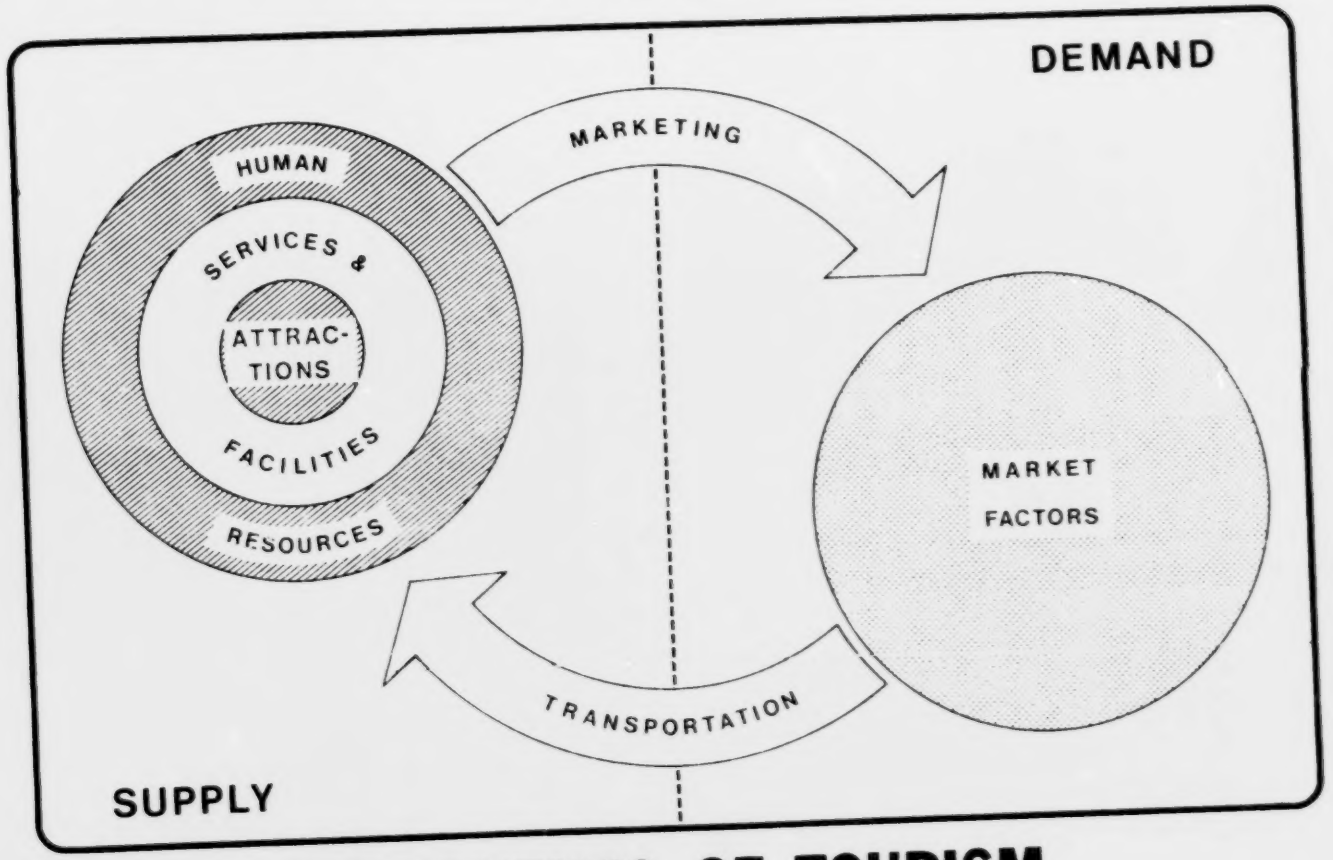
CHAPTER 3
NEW BRUNSWICK OVERVIEW

3.1 Components of Tourism

The tourism industry in New Brunswick, as in other areas has several basic components which are depicted grahically in diagram 3.1 and described as follows.

3.1.1 Attractions: Attractions are the driving force of the tourism industry. Without attractions, there would be no reason to travel and hence, less tourism. Each tourist has his own reason for travelling, but in the majority of cases it is to see something different which appeals to him. Since people are different, what attracts one will not attract all, and accordingly there is a great variety in the type of feature which may be termed an attraction. It is generally accepted that a tourist attraction is a natural or man-made feature which draws pleasure travellers by appealing to their desires or tastes. Attractions may fall into many categories, such as natural, man-made, historic, or recreational. The attraction may be an event instead of a thing and may vary greatly in its ability to draw and hold people. They may range from the attraction which draws a small number of people from a relatively local area, to a major attraction of national or international significance which holds them for a considerable time. Generally attractions which are unique to an area have greater drawing and holding power than those which are widely available.

DIAGRAM 3.1



COMPONENTS OF TOURISM

ATTRACTIONS

Seashore
Historic Areas
National & Provincial Parks
Culture
Resorts
Scenic Highways
Special Events etc

SERVICES & FACILITIES

Motels, Hotels, etc
Campgrounds
Restaurants & Food Outlets
Handcraft Outlets
Shopping Areas
Convention Facilities
Etc

HUMAN RESOURCES

Labour Force
Entrepreneurs
Skills & Training
Hospitality
Labour Legislation
Social Considerations
Etc

MARKET FACTORS

Type of Demand
Market Areas
Market Research
Seasonality
Repeat Business
Market Growth & Change
Etc

MARKETING

Advertising
Trade Promotion Efforts
Telephone Information System
Literature
Tourist Information Centres
Signs
Etc

TRANSPORTATION

Highway System
Airlines
Trains
Buses
Ferries & Marinas
Service Stations
Rest Areas, etc

3.1.2 Services/Facilities: Every individual requires certain basic services and facilities. Since the tourist is away from home he must find these services and facilities in the area in which he is visiting, or else move on. For example, every traveller requires a place to spend the night. This overnight accommodation may be in form of a hotel, motel, cabin, campground or the home of a friend or relative. Restaurants and food markets are also essential. Most tourists purchase a variety of goods during their travels and therefore shopping areas and handcraft outlets are essential. While the preceding services are required by every traveller, a great many tourists require such specialized services or facilities as convention facilities, boat rental, or even an area where scuba tanks may be refilled.

3.1.3 Human Resources: Human resources are vital in the tourism industry. Most elements of the industry require the existence of entrepreneurs and people willing to work in the labour force. For the industry to be financially successful, these local people must have the necessary skills and training to perform in a satisfactory and profitable manner. Moreover, other considerations must be taken into account, such as how local residents not directly involved in the provision of services regard the tourism industry. This has a strong effect on the reception and hospitality afforded to the tourist and can greatly affect his length of stay and desire to return at some future time.

3.1.4 Market Factors: The factors which determine New Brunswick's present and future tourism market are complex and numerous. They range from simple measures, such as the total

number of people in a market area, to very complex factors such as their psychological motivation to visit particular areas and not others. Every market factor is in a continual state of flux. Populations shift, incomes fluctuate, tourist expectations and aspirations change with a resultant effect on the popularity of different vacation destinations. Seasonal preferences by the tourist have a dramatic effect on most tourism economies. It is essential that the tourism industry of any area keep abreast of these continually changing market trends and, where possible, anticipate and carry out the required structural changes within the industry.

3.1.5 Marketing: One link between the market and the attractions and services is marketing. No tourism industry can exist unless the potential clientele in the market area know of the existence of the attractions and the benefit to be gained by visiting them. For most potential visitors, this means an advertising program to induce them to visit the province, and adequate conveyance of information during their trip. This information ranges from good highway signs to direct them on their route, to maps, brochures, and other printed information handed out at tourist information centres, as well as material sent through the mail prior to the trip in answer to the visitor's inquiry. All forms of promotion and information including some considered of minor importance have a definite effect on the tourist's decision whether or not to come to the destination area, how long to stay, what to see, and how much money to spend during the trip.

3.1.6 Transportation: The transportation system completes the connection between the market and the attractions. The potential visitor must be able to reach the destination area by his desired means of transport. Since over 85% of our visitors arrive by automobile, the extent and condition of our highway system directly affects the tourism industry. A smaller, but growing number of visitors arrive by air, train and bus. The entire range of transportation available to visitors wishing to enter the province deserves careful consideration.

Each of these components forms an absolutely critical link in the entire tourism industry chain. Deficiencies in any of them must inevitably affect the viability of the entire industry. The state of development of each component must be in balance with the state of development of all other components. It is ineffective to have one component developed to a much greater degree than other components, because the least developed component will generally prove to be the limiting factor. Accordingly, this strategy is based on the premise of balanced growth of the various components.

In assessing the balance for the strategy, the tourism industry was analysed from a demand/supply perspective. Reference again to diagram 3.1 reveals, that several components fall within the supply side while market factors essentially constitutes the demand side.

In order to set the stage for the analysis to follow the remainder of this chapter describes the magnitude and dimensions of the tourism industry in New Brunswick as related to demand and supply.

3.2 Demand

The past several years has seen New Brunswick draw approximately 4,000,000 visitors per year, including 1,800,000 overnight visitors. Another 100,000 residents vacation within the province each year. This means that on an average summer day, you could count 50,000 tourists (those who stay overnight in the Province), 15,000 excursionists (those who don't stay overnight), plus an additional 5,000 vacationing New Brunswickers. If gathered in one central location they would form the Province's fourth largest city.

In 1981, total tourism expenditures exceeded $290,000,000 of which 60 percent (over $175,000,000) were export commodities; ie., derived from non-residents visiting the province. Based on this $290 million, it is estimated that $ 21 million in taxes were generated. When the subsequent rounds of expenditures (multiplier effect) were accounted for, the total tax impact was $96,000,000.

TAXES GENERATED

The importance of the tourism expenditures is further reflected in the jobs created each year. Current direct employment in the industry for 1981 is estimated at 12,500 jobs while an additional 13,400 jobs are indirectly created by tourist spending.

DIRECT **12,500 MAN-YEARS**

INDUCED **13,400 MAN-YEARS**

TOTAL **25,900 MAN-YEARS**

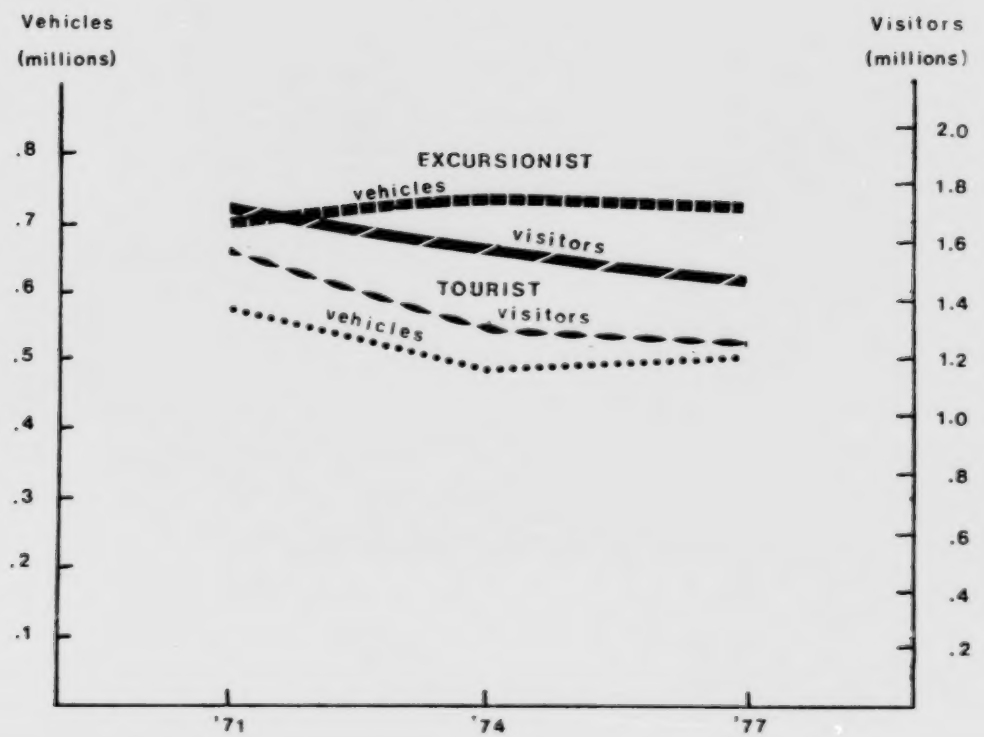
3.2.1 Visitor Demand

Based on statistics for summer traffic, the tourist industry enjoyed prosperity in the mid and late 1960's with annual visitation increasing an average 10 percent per year. This growth slowed in the early 1970's, peaking in 1973 with more than 3.4 million summer visitors. Visitation dropped suddenly in 1974, and remained at a lower level during the mid 1970's. From 1977 to 1981 growth was experienced. This trend is expected to continue into the immediate future.

It should be noted that the decrease in the number of visitors is due largely to a decrease in the party size rather than a decrease in the number of vehicles. This trend in party size has been consistent since the late 1960's and is the result of smaller family units.

DIAGRAM 3.2

VEHICLES VS. VISITORS REFLECTING CHANGE IN PARTY SIZE



SOURCE: VARIOUS AUTOMOBILE EXIT SURVEYS, TOURISM NEW BRUNSWICK

3.2.2 Mode of Travel

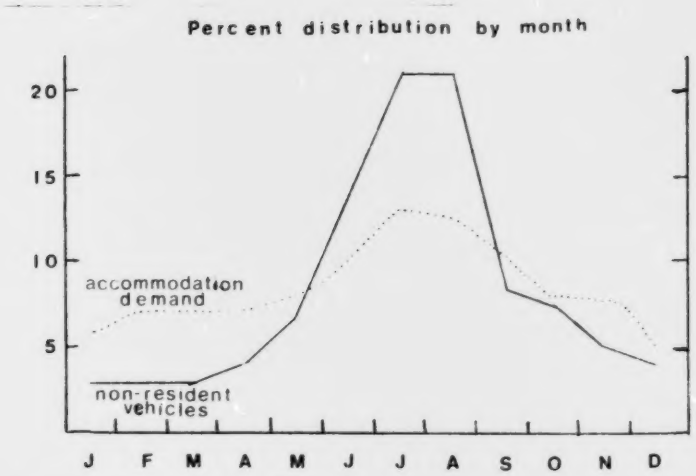
Travel to New Brunswick is dominated by the private automobile which accounts for over 85 percent of the total visitors to the province. There is a trend towards mass transport as illustrated by bus tours, which is the fastest growing mode of transportation. Over the last six years, bus tours have shown a 120% growth from 1134 tour nights in New Brunswick in 1975 to 2490 tour nights in 1981. Mass transport increases in importance as market distance increases, but the automobile is so vital to New Brunswick, that even in our most distant American market to California, it outnumbers all others as the chosen mode of travel.

Air transportation is steadily growing in importance and this trend will continue in the future. Rail travel is now showing signs of rejuvenation as evidenced by the successful VIA rail package promotion.

3.2.3 Seasonality

Tourism in New Brunswick is a season-oriented industry with the greater part of the tourist activity occurring in the summer months of July and August. There are indications however, that there is a trend toward growth in popularity of other seasons. Research shows that the percent of non-resident travel occuring in July and August has dropped from 67 percent in 1971 to 54 percent in 1980. The greatest increase in activity has been observed in the fall season and this latter period is considered to have significant growth potential.

DIAGRAM 3.3



SOURCE: BASED ON CUSTOMS COUNTS AND OCCUPANCY SURVEYS

While the number of non-resident vehicles tends to be extremely seasonal in nature, this seasonality is reflected to a much lesser degree in tourism-related accommodation facilities which also depend on commercial demand.

3.2.4 Market Origins

Nearby provinces and states are the stronghold of New Brunswick's tourism market with the majority of the Canadian visitors coming from Ontario, Quebec, and the Atlantic Provinces. New Englanders are the mainstay of the American demand. The significance of these nearby markets is a reflection of the dominance of automobile traffic and the market distance from New Brunswick.

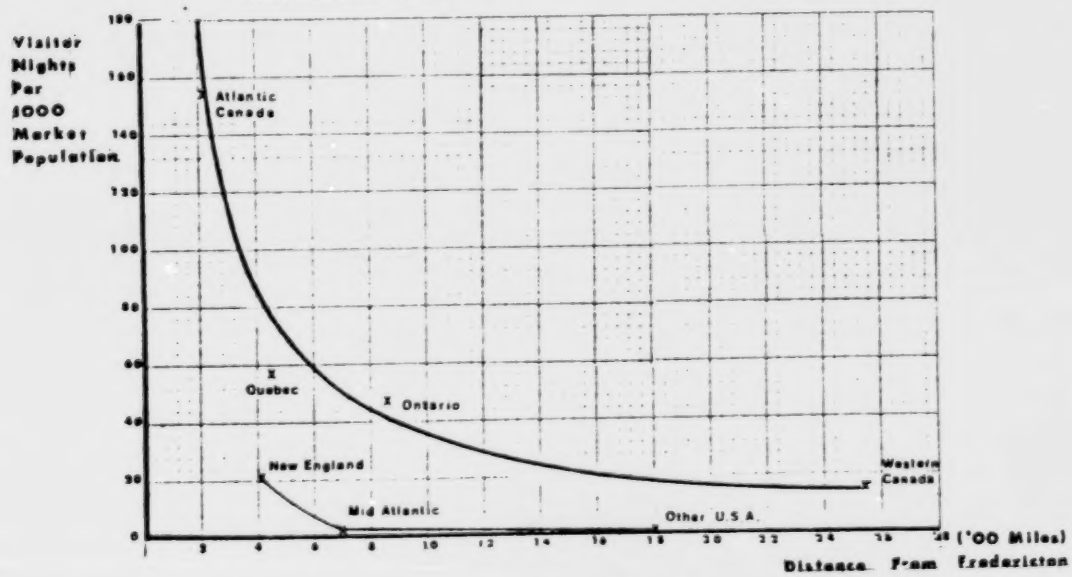
Diagram 3.4, clearly shows that as distance from New Brunswick increases people are less inclined to visit the Province. It is also illustrates that for any given distance from New Brunswick, other Canadians are more likely to visit the Province than Americans living the same distance away.

Until 1973 the United States accounted for 45 percent of the total visitation while Canadian visitors represented 55 percent of the total visitors. This ratio experienced a shift in 1974 and the pattern which has emerged since shows the United States now representing approximately 27 percent of the total units and Canadian visitors accounting for 73 percent.

In the future close-to-home markets will become even more important as shifts in visitation are influenced by such factors as increasing competition, awareness of nearby attractions, price and quality considerations, energy availability and exchange rates.

DIAGRAM 3.4

VISITOR PROFILE BY ORIGIN
(NON-RESIDENT AUTOMOBILE, MAY 15 - OCTOBER 31)



SOURCE: BASED ON 1977 AUTOMOBILE EXIT SURVEY, TOURISM NEW BRUNSWICK

3.2.5 Areas Visited

Travel within New Brunswick has traditionally been through the Saint John River Valley via the Trans Canada and along Route 1 by the Fundy Coast. The highway from Sussex (where these 2 routes merge) to Aulac receives the greatest volume of traffic with almost 45 percent of total visitor vehicles travelling in this area at some point during their trip. Highway 11 along New Brunswick's north and east coast is receiving rapidly increasing numbers of vehicles and is the third most important traffic route.

Areas travelled in the province also differ with visitor origins. Route 11 along the north and east coast is dominated by traffic from Quebec while Route 1 on the Fundy Coast depends heavily on American travellers. The Trans Canada Highway is a composite of different groups.

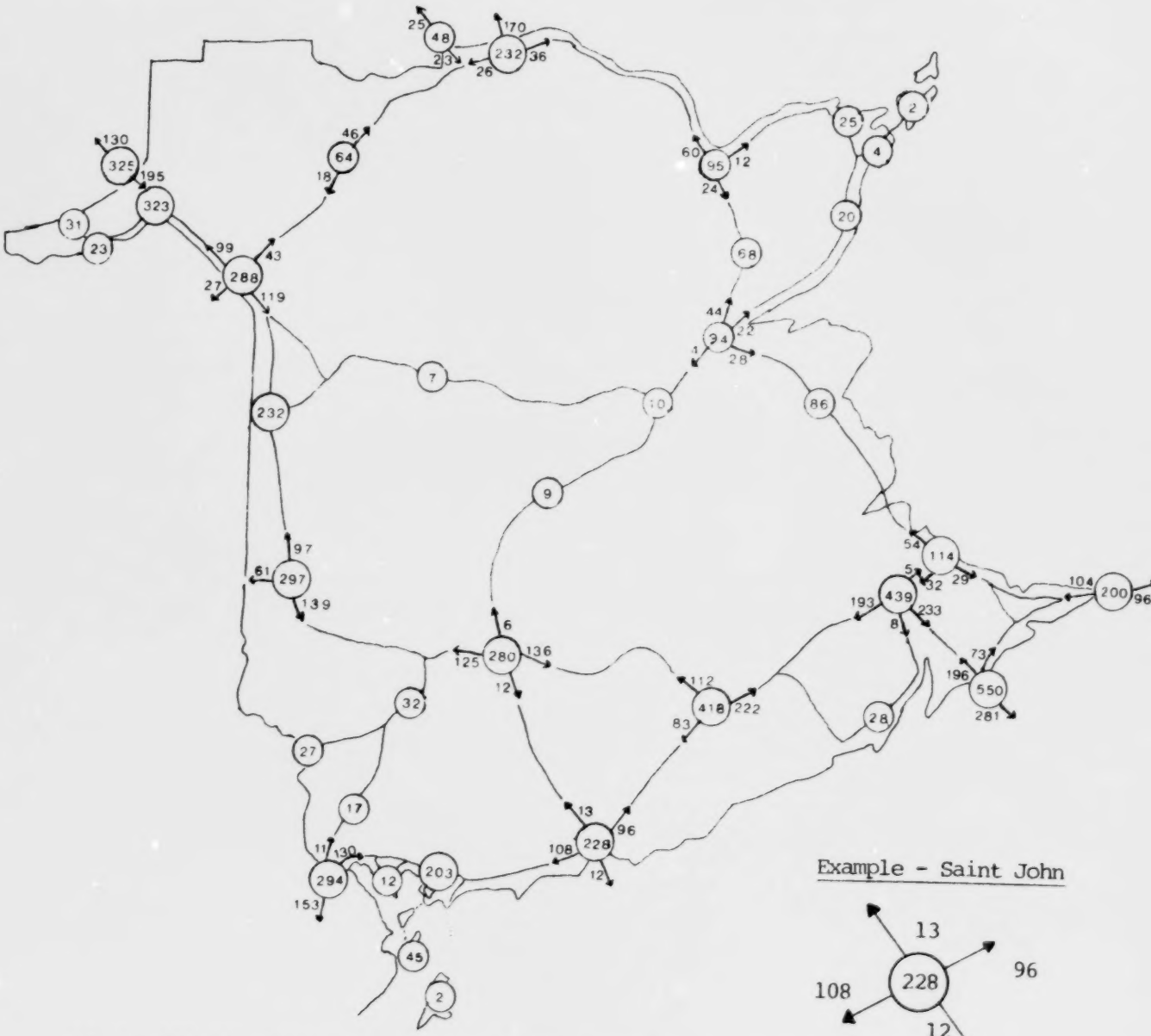
The Fundy coast and the northeast of New Brunswick have the highest incidence of overnight stays by tourists. The East coast and Western New Brunswick were only slightly less popular.

The recent shift in visitor origin has caused significant transfer in the distribution of party nights since 1971. (See Map 3.2).

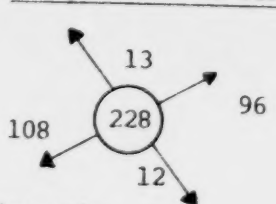
MAP 3.2

NON-RESIDENT AUTOMOBILE TRAFFIC FLOW - SUMMER 1977

A sample of non-resident automobile parties exiting the Province, between May 15 and October 31 were asked to trace their route through the Province and from this data, numbers of persons passing through given points were determined and direction of travel estimated. For clarity, several points have not been illustrated on the map while others show only total traffic and not direction.



Example - Saint John



Of the 228,000 non-resident auto parties passing through Saint John, an estimated 96,000 were travelling east bound towards Sussex an estimated 12,000 were travelling south towards Digby an estimated 108,000 were travelling west towards St. Stephen and an estimated 13,000 were travelling north towards Fredericton.

In the early 1970's the greater proportion of party nights were spent in Northwestern New Brunswick, Eastern New Brunswick and the Fundy Coast Area. By 1980, the Northeast had risen to claim the second largest number of party nights in the Province.

These shifts at the regional level reflect a lower level of American tourists, lower numbers of Ontario parties and their slight shift from the Trans Canada route to the Fundy Coast, and the increase in Quebec tourists and their shift after 1974 from the Southeast to the Northeast of the Province.

MAP 3.2: DISTRIBUTION OF NON-RESIDENT PARTY-NIGHTS BY AREA
(AUTOMOBILE, MAY 15-OCTOBER 31)

SOURCE: VARIOUS AUTOMOBILE EXIT SURVEYS,
TOURISM NEW BRUNSWICK

3.2.6 Purpose of Visit

Seeing New Brunswick and its attractions is the single most important purpose of the trip by all visitors to New Brunswick. Passing through and visiting friends and relatives were next in importance.

PURPOSE OF VISIT	PROVINCE OR STATE				
	NEW ENG.	ONT.	QUE.	N.S.	P.E.I.
Sightseeing	20.3	38.4	26.2	12.1	12.6
Visiting Friends & Relatives	27.8	15.9	24.1	19.0	12.9
Business	2.5	2.9	9.3	11.7	14.0
Passing through	11.2	40.1	15.6	31.2	50.6
Shopping	13.3	0.5	16.7	9.7	3.5
Other Purpose	24.9	2.2	8.1	16.3	6.4
Total	100.0	100.0	100.0	100.0	100.0

SOURCE: 1980 AUTOMOBILE EXIT SURVEY, TOURISM NEW BRUNSWICK

3.2.7 Industry Sales

The prime measure of industry performance is tourist spending within New Brunswick. Year to year comparisons are difficult without making proper allowance for inflation which has plagued most of the world economies over recent years, and so the sales figures are also presented in equivalent 1978 dollars.

Year	Tourist Spending $ Millions	Tourist Spending 1978 $ Millions
1971	111.4	200.1
1972	115.0	197.1
1973	125.0	199.9
1974	128.9	181.6
1975	140.0	173.7
1976	140.0	159.7
1977	170.0	181.1
1978	191.5	191.5
1979	225.0	202.0
1980	260.0	213.0
1981	290.0	214.0

Following rapid growth in the Sixties which peaked in the period 1971-1973, New Brunswick's tourism industry was adversely affected by several external events. Each of these events was the subject of massive coverage and publicity in the form of news coverage or intensive advertising campaigns.

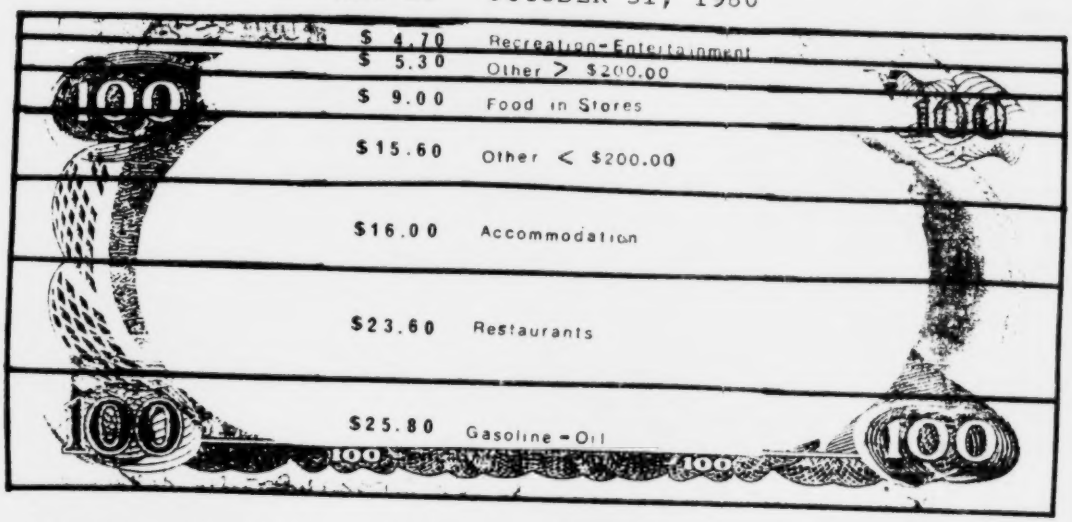
The U.S. energy crisis of 1973/1974 followed by the 1976 American bicentennial and Olympics in Montreal resulted in a decline in real tourist spending, particularly in our traditional American markets. This decline was most pronounced in 1976. The fact that tourist volume in 1971 - 1973 exceeded the accommodation plant's effective capacity during seasonal peaks was also a factor.

By 1977, a healthy recovery was underway and since then tourism spending has shown consistent annual gains in both nominal and real terms resulting in the record high level of $290 million in 1981.

By the early 1970's the nature of the North American tourism market was undergoing significant structural changes. Low cost package air tours to distant vacation destinations were within the financial reach of the average traveller. Considering this change and the consequent increase in competition for the discretionary travel dollar, the industry held the temporary decline to a reasonable level and rebounded quickly.

DISTRIBUTION OF NON-RESIDENT AUTO VISITOR SPENDING

MAY 15 - OCTOBER 31, 1980



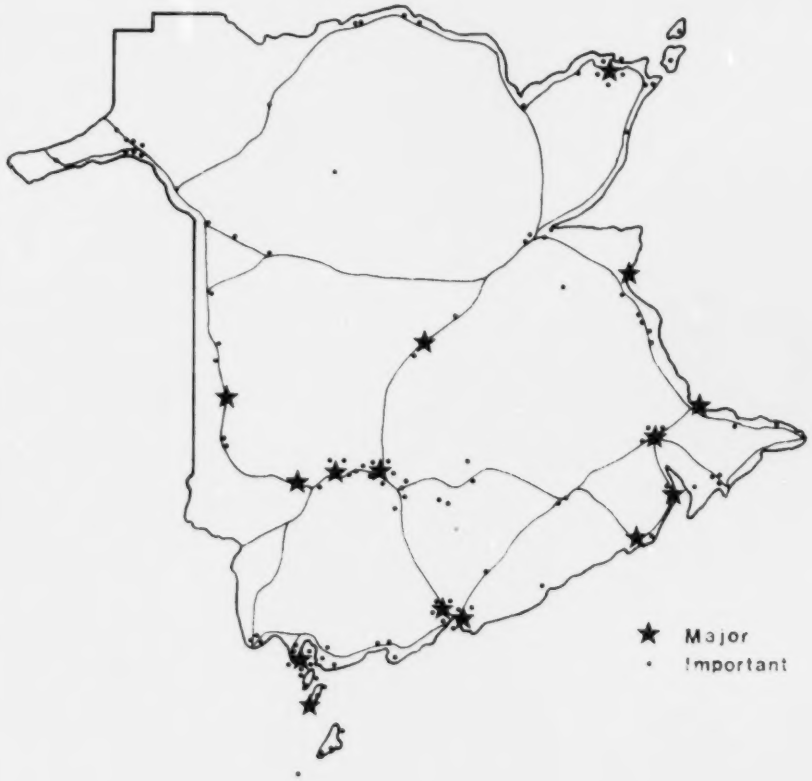
SOURCE: 1980 AUTOMOBILE EXIT SURVEY, TOURISM NEW BRUNSWICK

3.3 Supply

3.3.1 Attractions

The location of attractions in New Brunswick largely reflects the interdependent relationship with the main tourist traffic flow along Route 1 and 2 (See map 3.3). Destination area type clustering is evident in the Fredericton, Saint John and Fundy Isles areas but no large populated area of the Province is completely lacking in attractions.

Traditionally, the most well known natural attractions have been the Reversing Falls Rapids, The Hopewell Rocks, Magnetic Hill and salmon angling on the Miramichi. Man made attractions are now drawing larger numbers of visitors to the Province. These include high quality facilities such as Kings Landing and Village Acadien. Communities such as St. Andrews, and the capital city of Fredericton as well as our covered bridges, major provincial and national parks have high appeal to the tourist.



MAP 3.3

Attractions

MAP 3.4

Recreation Capability

Special events and festivals are also important to our visitors and can reinforce images of the Province. For example important activities portraying provincial history include Loyalist Days and the Acadian Festival. Illustrating the theme of relationship to the sea is the multitude of east coast festivals centred round various sea food harvests. In addition, large numbers of tourists visit various exhibits and shows around the Province.

While major shifts in the location of attractions occur very slowly there has been a recent and relatively rapid growth in two areas of the Province. Firstly the synergistic effects of developments stimulated by the creation of Mactaquac Provincial Park and King's Landing are continuing to grow as more and more attractions and associated services seek to locate in this area. Secondly there has been pronounced growth on the eastern coast reflecting developments at the Village Historique Acadien, Kouchibouguac National Park, and Parlee Beach Provincial Park.

To a large degree the future location of attractions in New Brunswick will be a function of the following two factors:

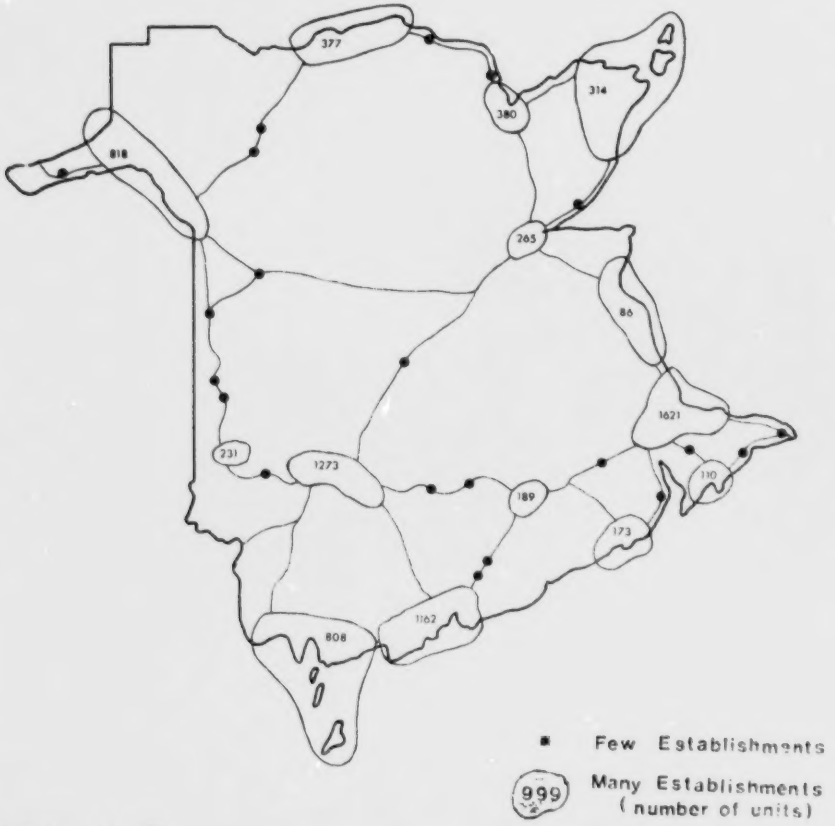
(a) The trend by tourists towards vacations at destination areas where all their needs are satisfied.

(b) The effect of government policies which encourage concentrated development in areas where growth opportunities for the private sector exist.

These factors mean tourists will travel less while seeing more. It has been noted that at present, there is a definite clustering of attractions in New Brunswick. In the future this clustering of attractions will be expected to take on greater importance, as the trend towards a destination area experience increases.

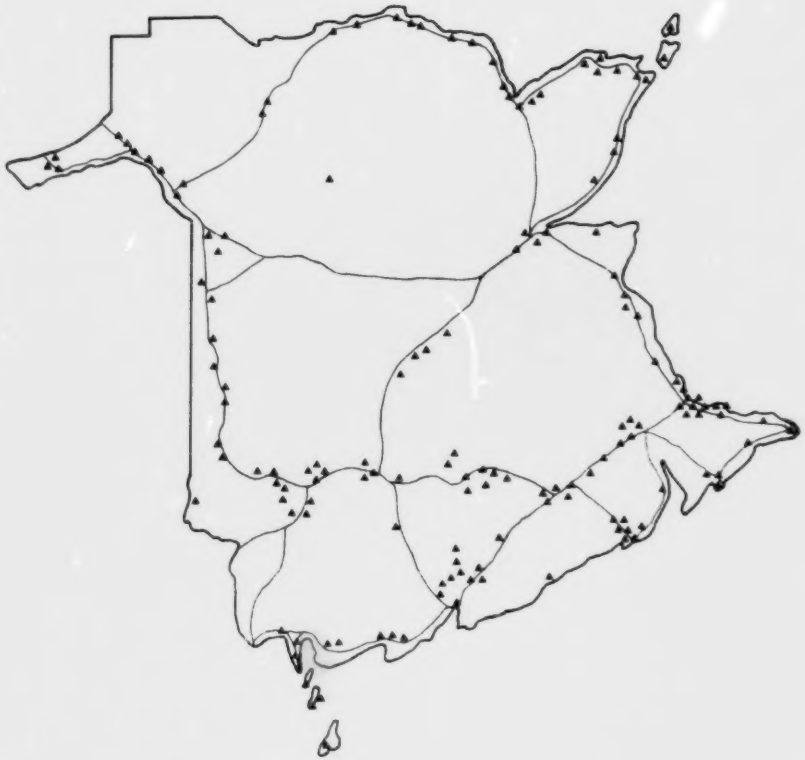
3.3.2 Services/Facilities

During 1980 a total of 8,400 accommodation units were operated in addition to an estimated 12,900 camping sites. The current supply of accommodation services is depicted in maps 3.5 and 3.6. Map 3.5 illustrates the high degree of concentration of "roofed accommodation" Roofed accommodation refers to motels, hotels, tourist homes, farm vacations, etc. Within this group seasonal operations tend to be clustered somewhat less than year around operations. Map 3.6, covering campgrounds, indicates that they are dispersed throughout New Brunswick but tend to be located nonetheless along the major tourist travel routes. The dependence of roofed accommodation on commercial traffic is a major factor for their preference for urban areas. Another important consideration in their location is the interdependence with the location of attractions and the overnight demand of tourists.



MAP 3.5

Roofed Accommodation



MAP 3.6

Campgrounds

The quantity and quality of supply available to meet current and anticipated levels of demand has been assessed in an accommodations requirements study which will be updated to 1985. Locations in the Province exhibiting potential for additional development are outlined in a later section of the strategy. Generally the supply of year-round accommodation is growing in step with demand. Seasonal accommodations other than campgrounds tend however to be in short supply.

Restaurants and other food service establishments are scattered throughout New Brunswick but as with accommodation the larger and year-round establishments tend to be located in urban areas reflecting demand from the market.

Recent years have been characterized by rapid growth in fast food outlets which offer low cost, speed and convenience making them attractive to travelling families. It is over the past several years as well that restaurants and lounges with live entertainment have really emerged in the Province. These latter facilities, clustered in urban areas, provide a variety of attractions respecting evening entertainment; often to the extent that they become more an attraction than a service.

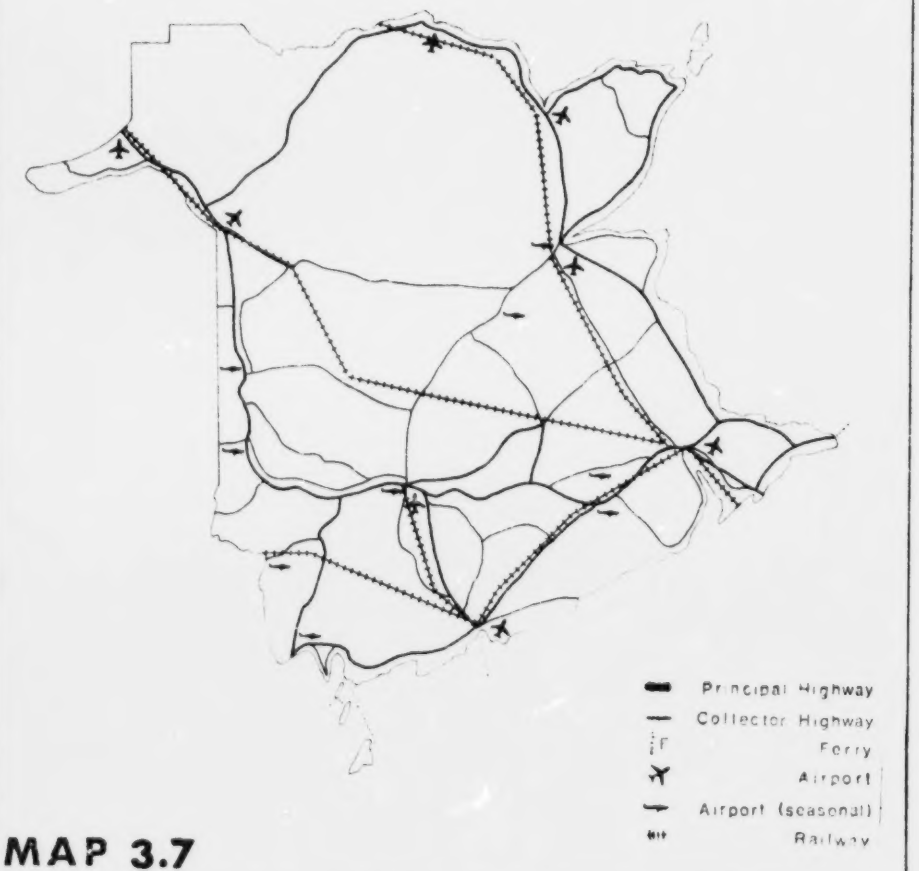
3.3.3 Human Resources

As stated previously, in 1981 approximately 25,900 jobs in New Brunswick were directly or indirectly based on the tourist industry. Major facilities that directly employ New Brunswickers as a result of initial tourist spending include hotels and motels, campgrounds, restaurants, stores, service stations, outfitters, transportation companies, crafts shops and special events and festivals. Of these, food service and accommodation establishments respectively are the two largest individual employees. The responding of incomes earned directly from the tourists supports additional indirect employment in virtually every segment of the provincial economy.

The human resource is not limited to only those people employed directly or indirectly as a result of tourist spending in the Province. All citizens of the Province benefit from tourism and contribute to its well being as they come in contact with our visitors. Genuine hospitality shown to tourists by all residents is an important human resource factor in helping the tourism industry grow.

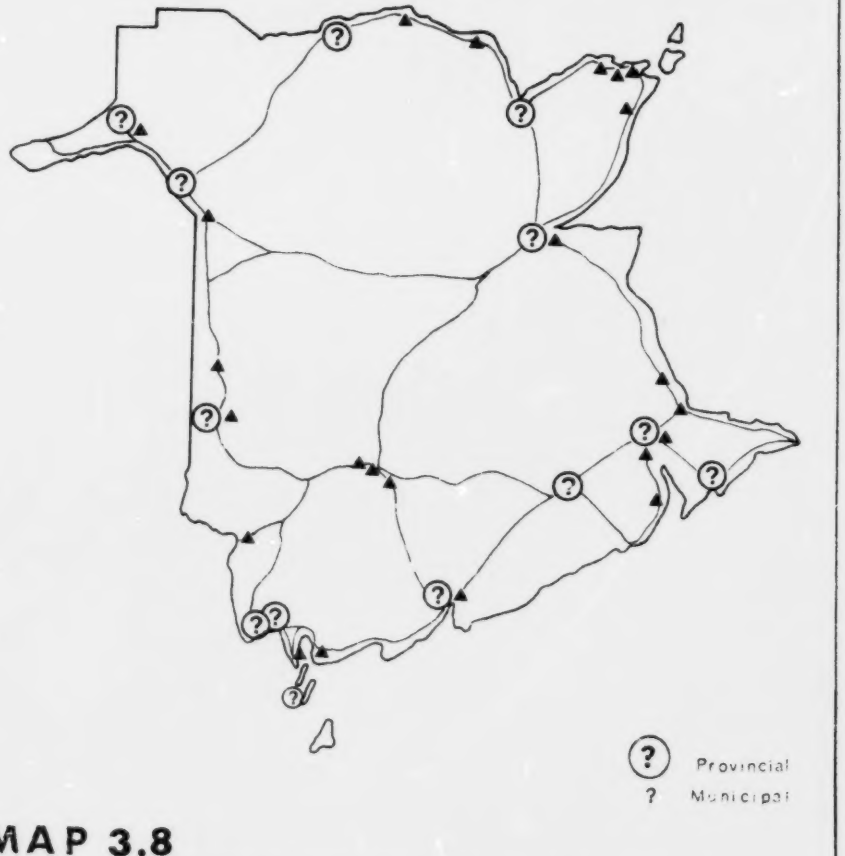
3.3.4 Transportation

The continuing predominance of the automobile as the preferred mode of travel by visitors to New Brunswick requires that the highway system provide easy access for the



MAP 3.7

Transportation Facilities



MAP 3.8

Tourist Information Centres

visitor to the Province's destination areas. The system of major arterials and secondary roads has undergone significant improvement in recent years. This improvement is expected to continue in the future.

Air transportation is an important, although presently small, segment of the total transportation network. Future growth will depend on the successful resolution of issues, such as lack of direct air linkages with the U.S.A. and proper customs clearance. Rail service is improving in quality and offers future potential through the VIA system.

3.3.5 Marketing

Marketing is discussed separately in Chapter 6. Map 3.8 outlines the location of New Brunswick's tourist information centres which serve as important points of literature and information distribution.

CHAPTER 4
ADDITIONAL ISSUES AND CONCERNS

From previous chapters it is obvious that the New Brunswick tourism industry faces a number of problems, such as energy. This chapter will draw together several other concerns, zeroing in those which will have the greatest impact.

4.1 Competition

Competition for the tourist dollar has increased significantly over recent years and currently rates as one of the most serious problems facing the industry today. Many factors have given rise to the increased competition not the least of which has been the success of the industry itself.

Partly because of its growth, more and more governments have recognized tourism as an important sector of the economy and contributor to overall economic growth. Accordingly greater attention has been devoted to stimulating tourism by increased advertising and other marketing efforts. Several of New Brunswick's competitors have significantly stepped up their marketing in recent years.

In a number of instances governments have also responded to the growing importance of close-to-home vacations by targeting their advertising campaigns towards encouraging their residents to vacation in their own province. Visitors who might otherwise have come to New Brunswick are being increasingly influenced to stay at home through efforts such as Ontario's "Yours to Discover" theme.

The rapid growth of tours, especially those oriented towards the Canadian market, is another sign of increased competition. More opportunities have been made available for Canadians to choose vacation packages throughout the country. In addition, deregulation of American air routes has contributed to low airfares to United Stated destinations. More attractions, such as theme parks, fill the market place. Greatly increased choice is available to the travelling public who are bombarded with massive campaigns to affect their choice.

Over and above competition within the travel industry the consumer is facing increased competition to make his expenditures in other areas. The showdown in growth of personal incomes in a period of continued high inflation has put more pressure on individuals and families faced with higher food, energy and housing costs. Developments in home computors and in video equipment have opened new areas of competition from the home entertainment field. Not only is there greater competition as to where to travel but there is greater competition as to travel at all.

4.2 Image

New Brunswick has an image problem which is made worse by the increased competition. If a product does not establish a strong image in the marketplace its ability to compete is severely restricted. All programs designed to attract visitors to the Province of New Brunswick have been predicated on the belief that the Province has an image in the market place. However the image is not well established and New Brunswick is not as well known as its neighbours.

The image that New Brunswick does have is of a picture province of diverse activities and attractions. This image has been developed by the advertising and marketing efforts in the past. Unfortunately, the general image of diversity has never been focused to strongly promote specific activities or attractions. As a result, the visitor has a pleasant image of the province which will encourage him to visit, but no specific images are developed enough to give the potential visitor a preconceived destination area in the Province. Contrast this with Nova Scotia which has consistently pushed such images as the Cabot Trail and Peggy's Cove. Recently, Tourism New Brunswick has adopted a regional approach wherein certain images are developed to assist the visitor to more easily identify with the Province and its diverse areas.

The adopted regions and images are as follows:

Saint John River Region	Acadian Coastal Region	Restigouche Region
-Relationship to the river	-Acadian culture	-Scenery
-History	-Beaches	-Outdoor Recreation
-Variety of attractions	-Relationship to the sea	-Interior Highlands

Fundy Tidal Region	Miramichi Region
-Relationship to the sea	-Wilderness experience (outdoor family recreation)
-Coastal phenomena	-Salmon angling
-Loyalist culture and heritage	-Folklore, festivals and special events

With sufficient promotion these regions and, more particularly, specific areas where the images are most dominant might be as well known as the Province's competition. Parlee and the Fundy Isles for example could evoke images as easily as Cavendish and Peggy's Cove.

However, it will take some time to establish these images in the minds of visitors and residents alike and the lack of a destination area - oriented image remains a serious constraint.

4.3 Price/Quality

It has been noted that transportation cost is just one of a number of increasing travel costs and it is the total of these costs in comparison with other competing destinations which constitute a major challenge for the industry. The ability to provide a quality product at the right price is vital.

The key to New Brunswick's competitiveness lies in the productivity of its human resource; both at the managerial and the employee level. Diagram 4.1 illustrates the relationship between a number of factors affecting or affected by the human resource and clearly demonstrates that productivity and prices are central to competitiveness, profitability and user satisfaction.

Visitors will be disatisfied if the value received for the price charged is less than in competing provinces or states. Such a situation reduces demand, resulting in lower profits and, ultimately, reduced private sector investment.

Several factors affecting price competitiveness are:

(a) Wages - Wages comprise a large portion of operating costs within the service industry. Future levels of minimum wage will have an important impact on price.

b) Training - Inadequate management and staff training within the tourism industry can result in poor quality service.

c) Seasonality - The seasonality of the industry in New Brunswick often necessitates the use of students and other part time help. This frequently results in a high turnover of staff which inhibits the amount of training which can be provided. This factor is described more fully below.

4.4 Seasonality

The seasonality of visitor volume continues to be a major characteristic of the New Brunswick tourism industry. Most non-resident tourist activity occurs from May to October with a strong peak in July and August. The implications in terms of manpower, training, income and investment are obvious and place constraints on development.

Seasonality is largely a function of two factors; the school year and the climate. The traditional school summer vacation both frees families to travel and provides a convenient source of student labour. This period of time also coincides with changes in the weather. Significant changes in the seasonal pattern of visitors will depend on changes in these two factors and none is anticipated.

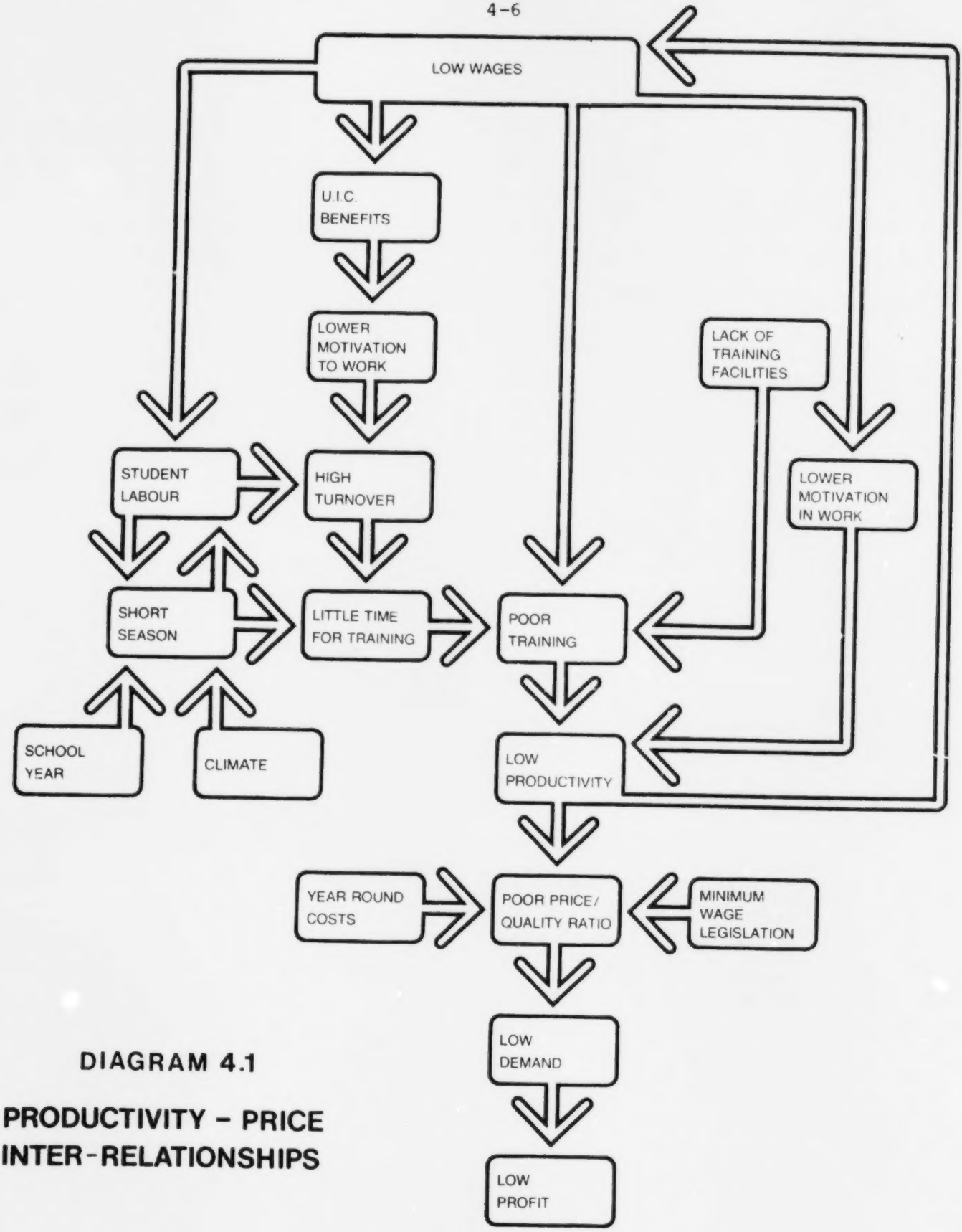


DIAGRAM 4.1

PRODUCTIVITY - PRICE INTER-RELATIONSHIPS

There are, however, changes in the market which will affect seasonality and which provide some encouragement for the future. Changing population patterns indicate relatively large increases in the numbers of retired people and in the number of young childless couples. Both of these groups are relatively free to vacation throughout the year, and it is with respect to these groups that the greatest potential exists for alleviating the seasonality problem.

Where opportunities exist to lengthen the season or to develop winter activities they should be exploited. Nevertheless, in a period when slow growth is expected in total, the importance of extending the season would be lessened if any weakness appeared in the main revenue producing months. Those businesses which are able to make a success out of a short season depend on strong summer months to cover year round costs.

4.5 Other Issues

4.5.1 Low Cost Accommodation

The lack of low cost seasonal accommodation has been indicated as a problem in New Brunswick. This does not necessarily mean that there is a need for additional accommodation units to be built in the province. One of the major assumptions underlying the strategy is that of slow growth in demand, and a danger exists of developing an over-supply of facilities. Only where there is clearly a

need for additional facilities should they be built. The emphasis on the problem of lack of low cost seasonal accommodation should be as a means of profitably servicing a relatively short period of peak demand. The most likely locations would be near good beaches on the Province's coasts.

4.5.2 Resident - Visitor Relationships

Visitors come to New Brunswick to enjoy its hospitality and lifestyle. However, tourism affects the resident as well as the visitor, and therein lies an issue of some significance. To the extent that tourism imposes some strains on the resident - visitor relationships, it may be viewed as undesirable by some residents. If this results in resentment and inhospitable behaviour toward the tourist, then it will affect the number of return visitors and the long term viability of the industry.

4.5.3 Lack of Developed and Promoted Destination Areas

Another problem is the lack of fully developed and promoted destination areas. These areas would have all of the components required to draw, service and hold tourists in the province. At the same time, there is a regional disparity of attractions and services and certain areas of the province offer less potential than others in terms of development of the tourism industry. The industry should develop where the greatest opportunity exists rather than attempt to develop as equally as possible throughout the province.

4.5.4 Land Availability

Land availability and quality is a problem. The future will hold greater competing demands for a limited land base. The conflicts between various industries (agriculture, forestry, manufacturing, tourism) and individual needs (water, recreation, homes) are increasing. The problem of land availability is particularly relevant to the provision of attractions. It is already a major issue along most prime coastal areas and will increase in the future.

4.5.5 Transportation

The transportation network (especially road and air) of New Brunswick imposes limitations on the growth of the tourism industry. For example, the poor condition of some secondary roads is a factor in discouraging the traveller from leaving the main highways. Inadequacies in ferry facilities and airport customs clearing facilities place some limitations on tourism development.

4.6 Summary

The strategy seeks to reduce or eliminate identified problems of the industry under a priority framework. Problems are assessed with respect to their relative importance and the contribution which the strategy might make to solve the problem within the time frame of the strategy.

Clearly the most serious problems facing the industry in New Brunswick over the next several years are related to competition, image, energy, price/quality and seasonality. On two of these problems the strategy can have little impact; on the other three, greater impact. High fuel costs and problems of fuel availability will depress travel. There is little scope for the industry to react to this situation and virtually no scope to change it. Similarly, seasonality will continue to be with us as climate and the school year remain unchanged.

The problems of competition, image and quality (relative to price) can be influenced by the programs encompassed in the strategy. A poorly established image is a major constraint to the overall growth of demand but efforts can be undertaken to strenghten the image and to compete successfully. While our price level is competitive our level of quality is in need of some improvement and, here again, improvements can be made.

The emphasis of the strategy is to attack these problems and others through programs designed to improve both quantity and quality of demand and supply. These issues are dealt with through the recommendations which follow in the second half of this report.

DEVELOPMENT STRATEGY

CHAPTER 5
OBJECTIVES OF STRATEGY

5.1 Introduction

The preceeding chapters of this report have outlined the factors which affect tourism industry development, presented an overview of tourism in New Brunswick and analysed the major pressures which the industry presently faces and can be expected to face in the future.

In the Eighties a concerted effort by government and the private sector will be necessary to alleviate identified constraints and to seize opportunities. Without this the future outlook for tourism in New Brunswick is one of slow, sporadic growth. The industry in general faces an overall weakness in demand. Similarly it is clear that the quality of supply must keep pace with changing trends while still remaining price competitive. These are two of the issues which the strategy seeks to address.

The purpose of this strategy is to provide direction to government and the private sector for tourism industry development into the mid-80's. The creation of productive jobs and increased incomes for New Brunswick residents in the tourism industry will be the highest priority.

The strategy has adopted a three level set of program priorities with respect to supply and demand. The most serious issues are related to weakness in demand and quality of plant relative to price.

Programs which address these issues are rated most highly.

Programs contributing to attraction development have a secondary rating.

Programs which contribute only to additional supply of services are only supported where there is clear evidence that a lack of services is constraining growth.

Basically, the strategy will recommend initiatives according to the following priorities in order to increase jobs and incomes

FIRST	- Direct stimulation of demand
	- Increase plant quality
SECOND	- More attractions
THIRD	- Growth in tourist services (where needed)

The ultimate objective then is to "encourage development of the New Brunswick tourism sector in order to accelerate and realize the maximum net economic benefit to provincial residents through increased output and improved productivity in the sector".[1]

[1] Canada - New Brunswick Tourism Subsidiary Agreement

The level of jobs and income in the tourism industry directly depends on the level of tourism expenditures. Tourism expenditures can basically be thought of as the product of

a) the number of tourists in an area
b) how long they stay, and
c) how rapidly they spend.

The greatest potential for increased tourism expenditures in New Brunswick lies in increasing the number of visitors and lengthening their average stay. Less potential exists in attempting to increase their rate of expenditures.

Both increased numbers of visitors and increased length of stay relate directly and closely to the problem of weakness in demand. More specifically, the full potential number of visitors is not realized because they do not have an image of the Province as a place to visit. And the full potential in length of stay is not realized because visitors do not have the information on the Province as a place to stay. Consequently, marketing is a key to the creation of jobs and incomes through increased tourism expenditures.

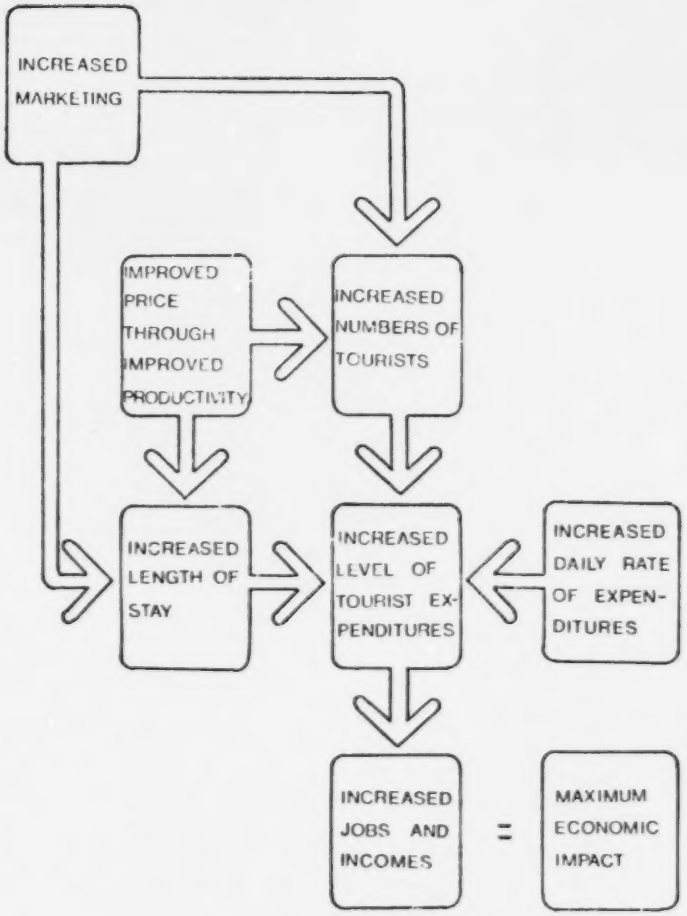
The quality of supply and price competitiveness also plays a very important role in influencing the number of visitors and their length of stay. The most successful marketing campaigns lose their impact if the plant available

to the tourist does not meet the tourist needs. Insofar as price competitiveness is concerned increased productivity is a very important factor.

Diagram 5.1 outlines the linkages which were just described between employment and income objectives and the key program areas identified for reaching these objectives.

DIAGRAM 5.1

OBJECTIVES



5.2 The Destination Area Approach

Now and during the 1980's tourists will increasingly seek out specific areas as destinations which offer a complete vacation package.

A tourist destination area is a specific area of New Brunswick which draws and retains a significant number of pleasure travellers for overnight and extended stays by virtue of its attractions. These attractions must be complemented by adequate services and facilities, population base and transportation links, the quality and scope of which are sufficient to permit successful marketing to an identified market.

Many Provinces and States have recognized the growing importance of these destination areas. In particular, Ontario, Alberta, Nova Scotia, Manitoba, British Columbia and the Federal government have adopted the destination area concept and are implementating it as a part of public policy. In addition, national support from the tourism industry for the concept of destination areas is evident from recommendations contained in the recent Sector Task Force on the Canada Tourism Industry.

It is undeniable that tourism opportunities for development do not exist equally across a country or province but tend to be concentrated in specific areas. Geographic

advantages, natural or man-made attractions, developed service facilities, etc., all contribute to the ability of certain areas to attract and hold large numbers of tourists for considerable periods of time.

In the New Brunswick context, the implementation of a destination area approach for the 1980's is considered essential to the long term well-being of the provincial tourism economy, for the following reasons:

- Certain areas already have a considerable infrastructure and attraction base. Continued development in this type of area makes the most efficient use of both private and public resources. For example the Acadien Penninsula is a rapidly emerging area which includes the Village Historique Acadien, the Marine Museum under construction, seacoast, and a unique cultural experience.

- The concentration of attractions has a synergistic effect on tourists. The effect of the whole is greater than the sum of the parts. The Fredericton-Mactaquac area clearly demonstrates this effect through the numerous private attractions and services which have located in the area since the development of Mactaquac Park and Kings Landing Historical Settlement. The availability of a variety of attractions provides more opportunity to satisfy diverse interests and increases length of stay.

- Tourists naturally concentrate their time in well known vacation areas as is demonstrated by the perennial popularity of St. Andrews as a resort community of international reputation.

- Rising travel costs are causing more people to seek total destination areas so that less time is spent in transit permitting greater emphasis on activities within an area. The proximity of the Fundy Isles to the U.S.A. and the growing popularity of its diverse features have stimulated increased development of tourism facilities.

- Destination areas are easier to market. They are easier for the traveller to locate and they are easier to describe. For example, the variety of winter and summer activities in the Campbellton-Dalhousie area ranging from downhill skiing to world renowned salmon angling, permits the marketing of this area to specific interest groups.

- Successful development depends in part on the existence of a local market. Destination areas to a larger extent than other areas have a concentration of local market, improving the chances of a successful operation. No better example of local market as an element of success can be found than the Moncton-Shediac area. The local demand from Moncton residents, for beaches and seaside attrac-

tions combined with high non-resident demand assures a viable summer tourism economy.

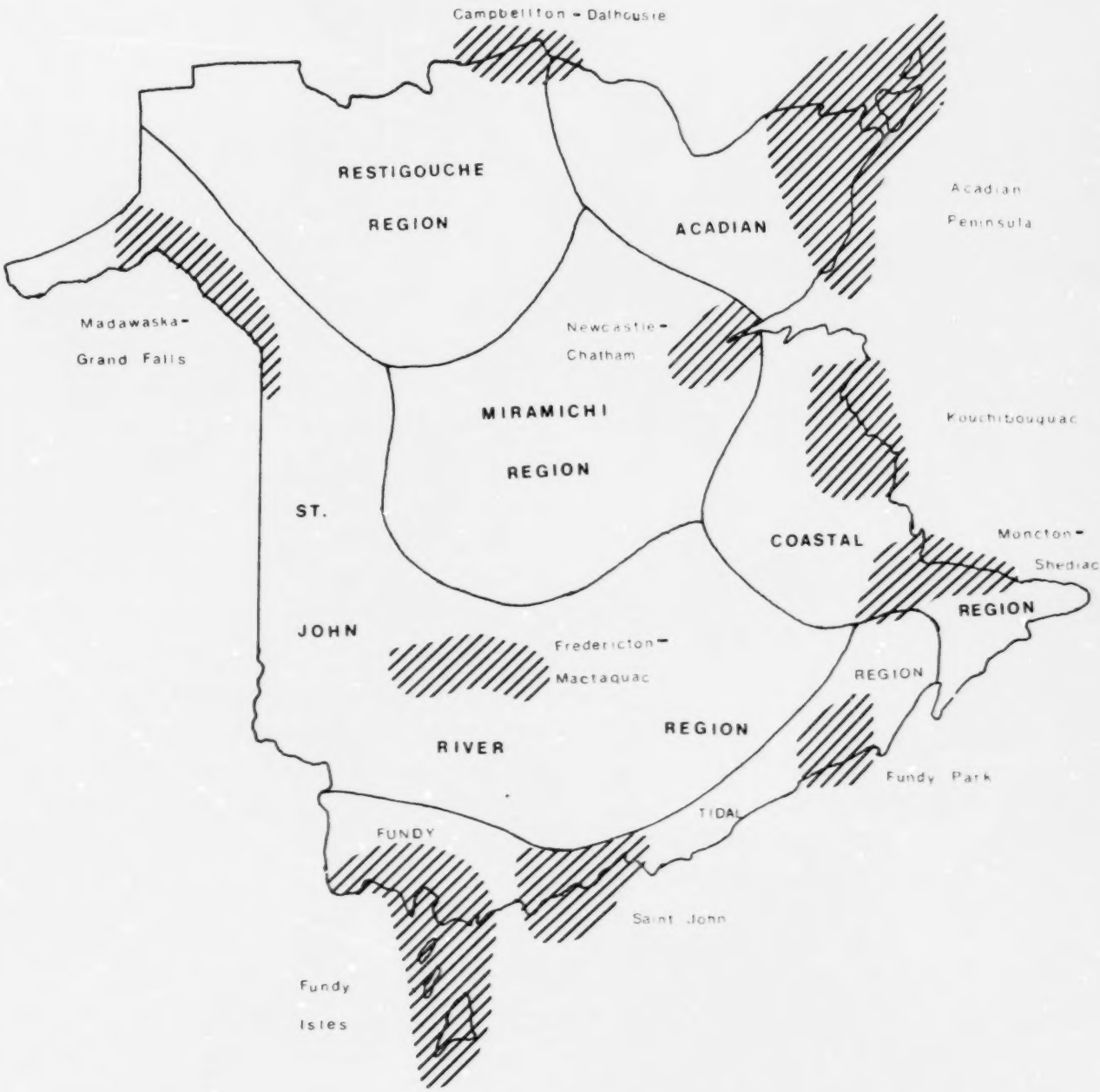
- Development in centres where the demand will be from varied sources improves prospects for lengthening the season and providing more permanent and higher paying jobs in the industry. It facilitates attracting trained and motivated personnel. The addition of Grand Falls Gorge as a major tourist attraction in the Madawaska/Grand Falls area will complement other attractions and services and further diversify the area's appeal.

For these reasons the concept of destination areas is considered to be fundamental to the successful realization of provincial development opportunities which will provide jobs and incomes for provincial residents.

It should be noted that maximizing total New Brunswick tourist volume and length of stay through destination area development and promotion will also benefit those areas between destination areas more than would a diffused approach.

Map 5.1 illustrates those areas of New Brunswick which the strategy considers to be destination areas and which have the highest present development and potential for development. It is in these areas where the continued development of the tourist industry is most likely to occur.

MAP 5.1 TOURIST REGIONS AND DESTINATION AREAS



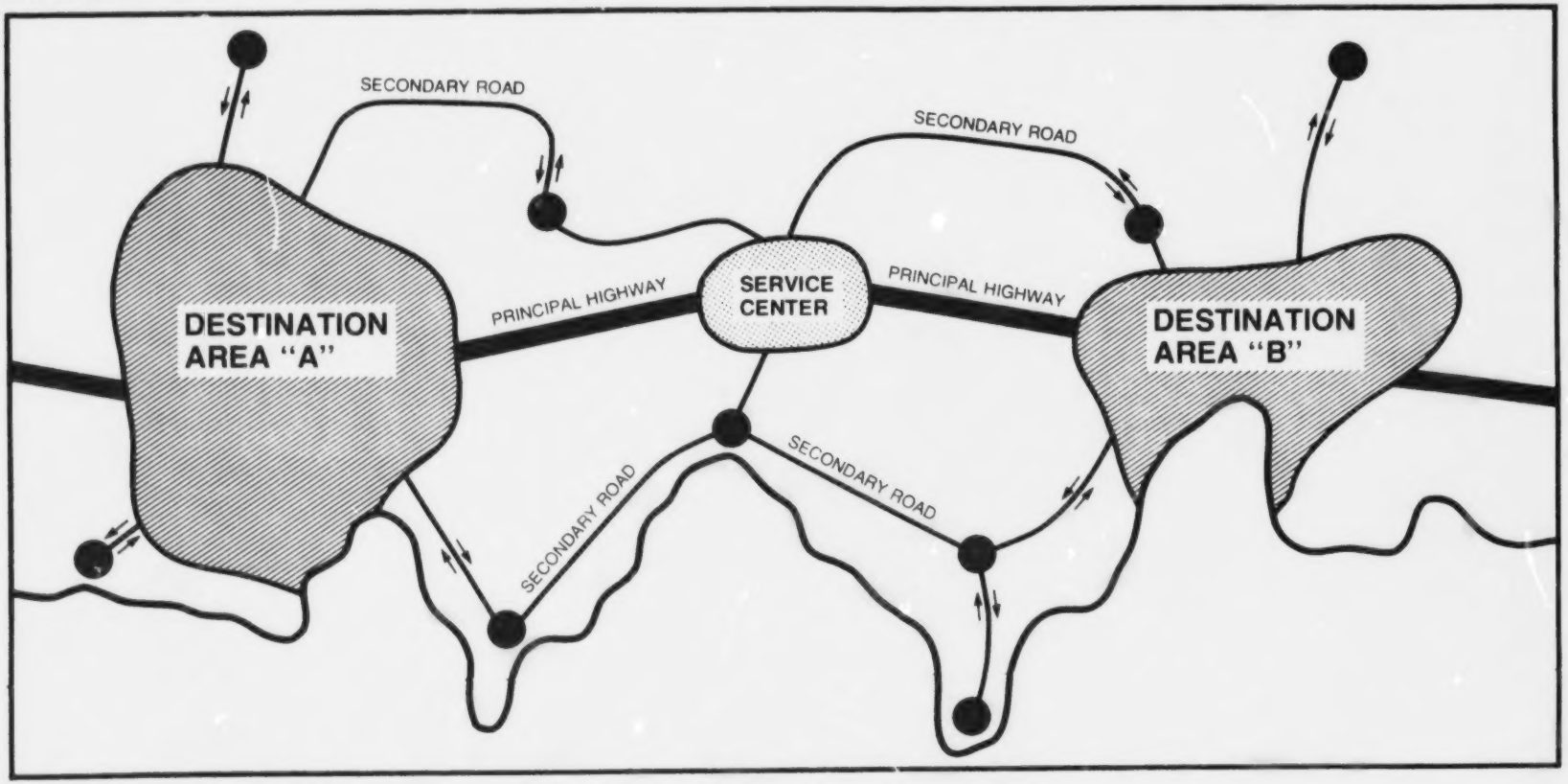
Note that the boundaries are not precise, that unmarked areas do not preclude development, and that in the end each investment will be judged on its own merit. In general however, it is important to recognize that the area of greatest potential may not be the area of greatest need. The strategy recognizes the overall goal of the government to assist areas of the Province which need development. While there is flexibility in the location of industries, tourism may not be the best industry for a certain area. Viewed from the overall economy the individual location of differing industries in selected areas where they have the most potential for development will, in the end, result in all communities contributing to the maximum growth of the economy.

The implementation of a development approach designed around destination areas will undoubtedly raise questions as to the future and role of those areas of the Province which have not been designated. It is important to note that these areas as well have a significant role to play if a destination area approach is to be at all effective. More pointedly, they are expected to benefit more from the promotion and development of destination areas than would be the case employing a diffused approach. These principles of interaction are illustrated in Diagram 5.2.

Primarily the destination area serves two functions:

(a) the initial attracting of the tourist.

DIAGRAM 5.2 **ILLUSTRATION OF DESTINATION AREA APPROACH**



DESTINATION AREAS	Diverse natural and man made attractions capable of drawing and retaining significant numbers of pleasure travellers. Sufficient services/facilities to support demand. Adequate local market and other human resources. High quality transportation links of various modes.	*Destination areas are bases for extended stays providing a full range of attractions and services*
SERVICE CENTERS	Sufficient services/facilities to handle tourists in transit.	*Service centers serve tourists by providing accommodation, food, shopping, etc. at convenient stopping points between destination areas*
●	Local attractions/events outside destination areas.	*Local attractions become day trips from base areas*

(b) the provision of a base from which the tourist can leisurely explore all of the features within a large surrounding area.

In other words the destination area is a core on which tourist activity in the surrounding area is centred.

Areas outside destination areas will benefit from day trips by visitors using the destination areas as their bases of operation and who would not be attracted there otherwise. For example, a local attraction or festival which, by itself, could not draw tourists from a long distance will experience increased tourist business as a result of the destination area's initial attraction of the tourist. In turn, these local attractions and events will serve to reinforce the destination area by increasing the diversity of activities that can be offered to the tourist. In addition the implementation of the destination area approach will require the availability of service centres between destinations which can provide accommodations, restaurants, retail and service facilities, all of which are important both to the tourist and to the local economy.

CHAPTER 6
PROGRAMS AFFECTING DEMAND

6.1 Introduction

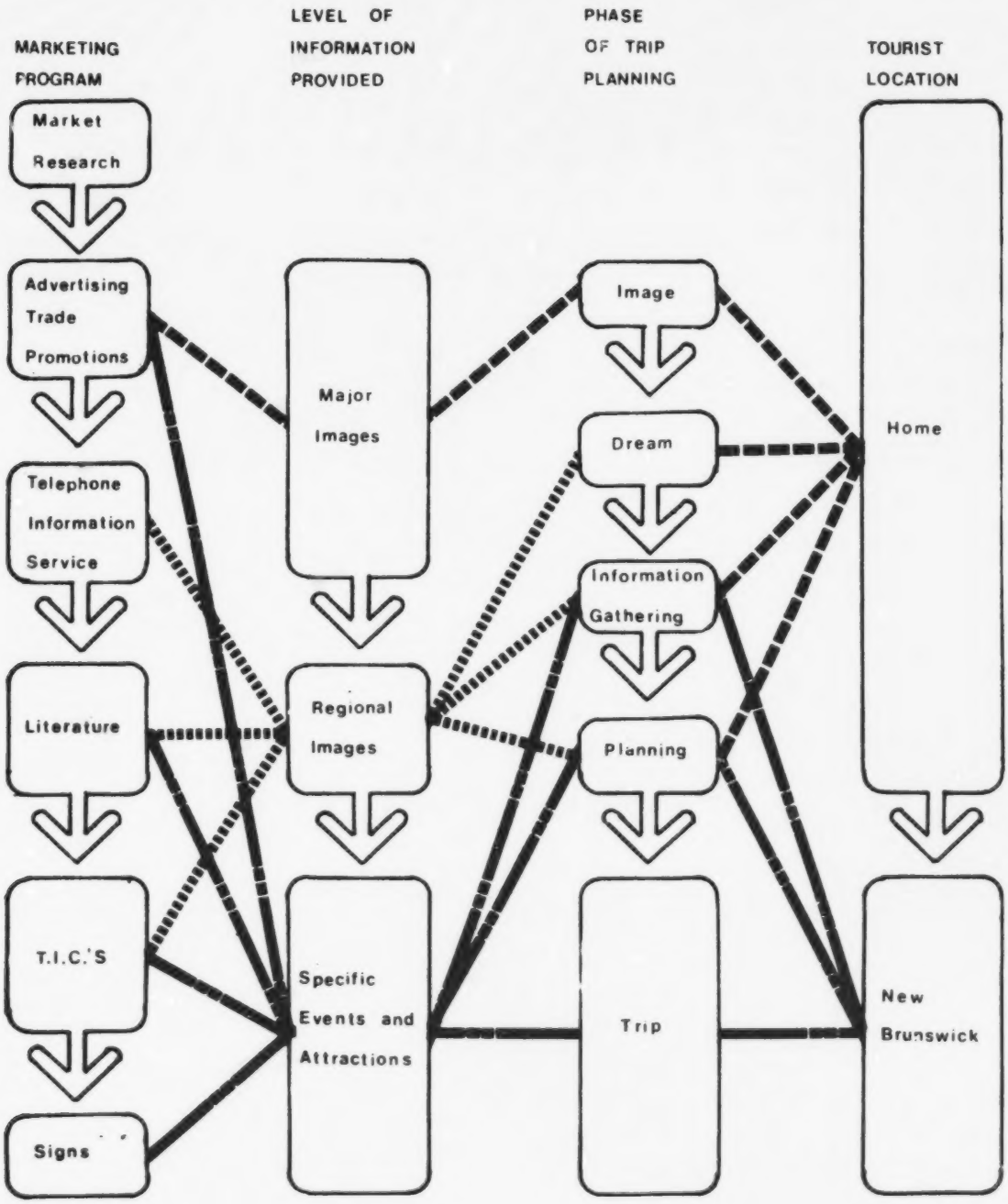
All of the programs which affect demand can be grouped under the marketing category. This encompasses market research, advertising, various trade promotional efforts, telephone information systems, literature production and distribution, editorial services, tourist information centres (T.I.C.), signing, and other promotional efforts. Everything from research preceeding actual contact with the tourist to answering his questions while he is in the Province is an element and will influence his decisions.

Marketing programs are a key to stimulating demand and are central to overcoming the important concerns of lack of image and awareness. Increasing emphasis must be placed on the marketing of New Brunswick by both government and the private sector to potential visitors.

Tourism New Brunswick markets and promotes travel to and within New Brunswick through the following programs:

- market research
- advertising
- travel trade development
- telephone information
- literature and editorial services
- tourist information centres
- signs

DIAGRAM 6.1 - VACATION SELLING/PLANNING



Because each of the programs is linked together, changes in any one will affect a number of others. (See diagram 6.1). If the magnitude of one (eg. advertising) is made greater or lesser, demand for others (eg. literature distribution) will be affected. If the emphasis is changed (eg. use of regional images in literature), then there will be a corresponding effect on the emphasis in related programs (eg. questions asked at Information Centres). The overall effect of recommendations should be kept in mind as each program is reviewed.

6.2 Market Research

Background

The Department recognizes a need "to provide data for the development of marketing strategies and to assist in the evaluation of marketing programs."[1] This need for market information is met through the undertaking of marketing surveys and studies which provide base information for the formulation of future policies and programs.

1 Departmental Manual p. 203-1

Data collection currently includes such initiatives as the occupancy program, auto exit, air exit and tour bus surveys. Statistics and other marketing data generated elsewhere are also collected. This allows the matching of product to the market to guide the Department in its selling efforts.

The market research effort is directly related to all promotion efforts of the Department and is the base for advertising, literature production, trade promotion and other programs.

Analysis

In recent years market research has been given a higher priority and this will continue into the future.

In addition, the Department has established measurable market objectives against which the success of the marketing program can be evaluated.

Objective

The specific program objective is to obtain and analyze product and market data required to

(a) develop practical marketing strategies, and

(b) evaluate the chosen market programs.

Recommendations

It is recommended elsewhere that marketing efforts should be increased. It is therefore important that continued emphasis be placed on market research as the foundation of this effort. This research should strike a proper balance between existing travel patterns and emerging trends to be felt in the future.

Research should ensure the compatibility of specific markets with the regional images used in advertising and other promotional programs.

The Department must continue to establish a recognized and accepted set of market priorities on an annual basis. These priorities should be established in consideration of market position by geographic area, by mode of travel, and by other relevant characteristics. These should form the framework for an annual market plan which clearly sets out the objectives and means of achieving these objectives for any given year.

Further, the Department must as a high priority take immediate steps to prepare a longer term marketing strategy within which the annual marketing plan can effectively operate.

6.3 Advertising

Background

The Department operates an advertising program "to attract an optimal number of visitors to the Province, and to encourage residents to 'vacation at home'".[1] This involves radio, television, newspaper and magazine advertising campaigns in eastern Canada and the eastern United States.

Since 1974 the Department has concentrated its advertising efforts on the Canadian market due primarily to high advertising costs in the United States and corresponding budget constraints.

In 1980, a significant advertising campaign within the United States was re-instituted. The Province also continues to be involved in a co-operative campaign; the Atlantic Canada Tourism Program (A.C.T.P.) which includes the United States market.

Within New Brunswick and the nearby Region, the Department annually operates an advertising program involving newspaper, radio and television coverage. This initiative is intended to

(a) increase awareness by New Brunswick residents of the importance of the tourism industry and

(b) increase travel within the Province by residents of New Brunswick and nearby areas.

[1] Departmental Manual p. 208-1

Analysis

From 1974 to 1979 Tourism New Brunswick's budget for all tourism marketing programs failed to keep pace with inflation. In this period advertising budgets fell at an average rate exceeding 3% per annum while inflation increased rapidly. Moreover the advertising program has been doubly weakened due to the extreme rates of inflation in media advertising costs.

This forced a policy of withdrawal from the U.S. markets in order to maintain strength in Canada. As a result New Brunswick was without a meaningful U.S. campaign between 1974 and 1979. During that time there has been a steady erosion of U.S. visitation.

The American market remains too valuable and important to be lost. Advertising in the United States is essential to the realization of its potential. The success of the Department in obtaining funds to re-enter this market in 1980/81 must be considered a major step forward towards the recapture of our market share in this area.

A number of Provinces and States engage in cooperative advertising campaigns with private entrepreneurs sharing part of the cost. This not only stretches the dollars further but also improves effectiveness where the combined exposure is more powerful than individual efforts. Cooperative advertising efforts work best with specific markets which governments and the private sector agree should be developed.

Objectives

The objective of advertising is to stimulate demand through

(a) increasing awareness of New Brunswick in the marketplace as a potential vacation destination and

(b) increasing the number of serious inquiries for additional information on the Province.

Recommendations

While the availability of funds in 1980/81 for the United States market is a positive development, it must be considered only a beginning. Strong efforts by the Department will be required in the future in order to ensure that increased funding for this market will be forthcoming. This is essential if the Province is to recapture its share of this important market.

Tourism New Brunswick should develop cooperative advertising campaigns with private enterprise for special interest markets.

Expenditures on advertising within market areas must reflect the priorities established by the Department in the annual Marketing Plan and in a long term marketing strategy. (See Market Research recommendations).

6.4 Travel Trade Development

Background

Tourism New Brunswick operates a number of programs to affect the travel trade who in turn will help to sell the Province to the potential customer.

The Market Development Program provides continuity with operators in each of the Province's markets. Five market areas are defined with a manager responsible for each: two in the U.S. (Eastern and Central-Western) and three in Canada (Ontario, Quebec and Regional). The intent of the program is to establish personal contact with wholesalers, bus tour operators, travel agents, auto club counsellors and convention and incentive travel organizers who are in a position to directly sell New Brunswick.

The Department also undertakes the following efforts as components of trade promotion:

Individual familiarization tours which are escorted tours of New Brunswick for individual wholesalers and tour operators at the decision making level for the purpose of meeting the private sector to develop new ventures.

Group familiarization tours which are escorted tours of New Brunswick for groups of travel agents, automobile club counsellors, C.T.O.T. personnel and travel writers to show them the facilities and attributes of the Province as a vacation destination.

Travel and trade shows which expose the attractions and facilities of New Brunswick to travel trade personnel.

The tour development program which provides assistance to the private sector in the development of package tours to expand group and individual travel.

Convention solicitation support which is used to increase awareness of convention facilities available within New Brunswick.

The Toronto office which is operated to service inquiries and to assist in travel trade selling efforts in that area.

Analysis

There is a tremendous potential in tour companies presently visiting the region and emphasis is being given to extending their length of stay in New Brunswick. In a period when tours to the Atlantic Provinces remained relatively static, bus tours to New Brunswick were increased by 120% since 1975. This developing market must continue to receive priority as a strong growth element in the 1980's.

There is as well potential to develop special interest tours centred on specific destinations and attractions. Fly-bus tours are also growing in importance.

Since travel trade sales depend on the awareness of New Brunswick by the actual vacationer, these travel trade

efforts are linked to our advertising and other programs.

Rapid changes are occurring regarding conventions which are an important source of business to the industry. While previous solicitation programs helped to make convention organizers aware of facilities in New Brunswick, competition is increasing intense for large national conventions where growth is not expected. Most of the opportunity exists in the smaller conventions and regional meetings. Tourism New Brunswick provides support to the industry seeking to attract conventions by researching lists of key convention organizers and providing back up support to convention proposals.

In seeking out opportunities for development of mass modes of transport, the automobile traveller should not be neglected. Marketing efforts to automobile clubs are encouraging and must remain a high priority. Nonetheless in the long range there is significant potential in mass transportation and growth must continue to be encouraged.

Package tours have a good potential for future development since they simplify many trip decisions and remove uncertainity surrounding the cost of the trip. While package tours rely heavily on mass modes of transport, a large potential also exists in packages for automobile travellers.

Objectives

The objective of trade promotion efforts is the development of packaged vacations in New Brunswick thereby contributing to increased length of stay by more visitors.

Recommendations

Annual and long range targets should be set including number of room nights by various modes for package tours. Development of opportunities identified through familiarization tours should be pursued.

Continual emphasis should be placed on the automobile traveller and more consideration should be given to ways to further develop and promote package tours for this sector of the market.

6.5 Telephone Information/Reservation System

Background

Tourism New Brunswick presently operates a telephone information system in Canada and shares in an Atlantic Canada information system to the U.S.A. Also, it operates a free reservation system within the Province. This system, located at provincial tourist information centres, Kings Landing and the Village Historique Acadien, is used primarily to make reservations at motels, hotels and private campgrounds.

Analysis

The dial-a-nite system provides a satisfactory and effective level of reservation service within the Province. While there is not presently a need for a

more complex or extensive reservation system, the Department will continue to monitor new technology developments with a view to future improvements in the system.

The telephone information system has operated well in its initial stages. The information is contained in typed manuals which must be consulted prior to responding to information requests.

The Department also began implementation in 1978 of a word processing centre to respond to written requests. This has proven effective.

Objective

Dial-A-Nite - The objective of the dial-a-nite system is to provide visitors to New Brunswick with an easy to use toll-free means of making reservations for overnite accommodation within the Province, thereby contributing towards an increased length of stay.

Information - The objective of this program is to provide fast, accurate and courteous answers to telephone and written inquiries in order to contribute towards increased visitation and greater lengths of stay.

Recommendations

It should be determined whether retrieval of information for telephone inquiries could be better effected through automated microfilm techniques. The currently used

manual system should be retained until it becomes practical to replace or supplement it with a newer technique, such as microfilm.

The Department should restrict itself to the dial-a-nite system rather than a regional or national reservation initiative.

6.6 Literature & Editorial Services

Background

Next to advertising, literature production and distribution costs consume the largest portion of Departmental marketing expenditures.

The Department produces a standard literature kit used for mail inquiries which it receives annually. In 1981, this kit contained the New Brunswick Is Booklet, Accommodation Booklet, Provincial Map and Special Events Folder.

The Department also produces or distributes lesser quantities of promotion material which is either of a general nature or related to a specific activity or area.

Other New Brunswick government agencies such as Historical Resources Administration promote their own individual attractions such as Kings Landing and the Village Historique Acadien. In a broader context, federal government agencies such as Canadian Government Office of Tourism prepare and distribute selected literature pieces throughout Canada. A particular example is the "Welcome to Canada" program in which informational literature kits are given to

non-residents by Canada Customs officers. These kits are provided through a cooperative effort between C.G.O.T. and the individual provinces, including New Brunswick. Various municipalities and community groups produce material about their local or regional areas. Private enterprise also advertise their specific services or attractions.

Editorial services, as a part of the marketing program, involves the preparation and submission of feature articles on New Brunswick to newspapers and magazines throughout North America. These articles act as a form of non-paid advertising by keeping New Brunswick attractions and events before the reading public.

Analysis

Literature is the key link between planning a vacation and actually visiting a specific area. Literature must both reinforce the image phases and provide the required information to plan the trip. The provision of literature to back up advertising efforts is essential to complete a proper selling effort. Literature also provides guidance to the tourists while actually on vacation in New Brunswick.

The quality of literature produced and its relationship to the overall marketing effort cannot be over-emphasized. Consistency of image, themes, and facts is fundamental. It is imperative that the literature accurately reflect the New Brunswick product in a manner that complements other marketing efforts.

Objectives

The objective of literature production is to reinforce other marketing efforts through the provision of literature which will

(a) influence tourists to vacation in New Brunswick

(b) provide the information required to plan that vacation.

The objective of editorial services is to obtain free publicity for the Province through the preparation of travel oriented articles to be published in newspapers and magazines in our market places.

Recommendations

A multi-year printing budget should be adopted outlining planned literature pieces, scheduling, quantities to be produced and estimated costs.

The destination area concept should, in future literature, receive special emphasis.

The publication "New Brunswick Is" should be retained as the principal promotional piece of literature. Alterations should be made as required by shifts in market trends and plant composition.

Literature produced by Tourism New Brunswick should continue to emphasize the creation of regional images.

Editorial services should continue to be provided to the market place to supplement purchased advertising.

6.7 Tourist Information Centres

Background

"Tourist information centres are an integral part of the Department's travel information services program. The policy of the Department is to develop and operate tourist information centres at carefully - defined locations in order to personally greet the travelling public and provide complete and factual information on all regions and destination areas of New Brunswick. Information centres are to be constructed, maintained and operated at (a) major tourist entry points to the Province and (b) at strategic points of major traffic mergers within the Province. The policy also includes assistance to municipalities or local service groups to operate tourist information centres within their respective areas." 1.

[1] Departmental Manual p. 311

Accordingly the Department has completed construction of four modern T.I.C.'s at the major entry points of Campbellton, Woodstock, Edmundston and St. Stephen. The remaining major entry point Aulac, is serviced by an existing centre, however a new centre is intended for this location when highway realignment permits. The Province supplements these border entrance centres with T.I.C.'s at St. Leonard, Waweig, Saint John, Moncton, Penobsquis, Newcastle, Campobello and Bathurst. Approximately 20-25 municipal information centres operate throughout the province in any tourist season.

Provincial T.I.C.'s are designed to provide the traveller with information on

(a) each of the Province's designated tourist regions as well as the route on which he is travelling

(b) attractions and services on alternate routes which still allow him to reach his destination.

Analysis

At the current time T.I.C.'s are fairly well located throughout the Province. Changing travel patterns

and proposed changes to the highway network will inevitably alter this situation.

Objectives

The objective of tourist information centres is to significantly increase the length of stay of tourists through

(a) courteous provision of information on the province and its regions

(b) promotion of alternative routes to chosen destinations.

Recommendations

A comprehensive and future-oriented T.I.C. system plan should be prepared immediately. This plan will serve as a guide for T.I.C. construction and operation at all levels, eg., provincial, municipal and private.

A "sale-oriented" approach to counsellor training is required in order to ensure that active promotion of provincial attractions and services is undertaken at all T.I.C.'s in addition to the normal provision of information

Clearly-defined sales objectives should be established for each T.I.C. focused on

- immediate area and region

- alternative regions and routes to destination.

A system plan should consider the present three level policy of the Department respecting the T.I.C.'s. Serious consideration should be given to ranking locations, operational jurisdiction, funding considerations, and training.

6.8 Signs

Background

Signs are an important supplementary source of information to the tourist travelling through the Province and serve to

- provide direction (guide signs)

- inform as to location of services and attractions (information signs)

- promote special aspects of the Provincial tourism system (special information signs).

Guide signs indicate routes, distances and exits. They are located and maintained by the Department of Transportation and range in dimension and complexity from large overhead multi-informational boards to small metal or wooden road side boards providing a single piece of information.

Information signs indicate the location of food, attractions, fuel, accommodation, and other services, of tourist information centres and of National and Provincial parks. Those for food, fuel and accommodations were standardized in a program begun in 1975 to replace private commercial signs along main and arterial routes throughout the Province. In 1978 the signing program was modified to allow for limited private commercial signs.

Examples of special information signs are those which welcome tourists to New Brunswick and major provincial attractions. They could also be used to supplement various approaches to marketing the tourist product, whether it be information by region, destination area, scenic drive or image. In the past information signs designated four separate trails within the Province. Presently, one community is designated as a Resort Area while another part of New Brunswick is promoted by special Beaches signs.

Analysis

Guide signs are generally adequate on major routes but are deficient on secondary roads which are promotable

for touring. Since the Department of Tourism wishes to direct tourist traffic off main arterials to other routes, increased emphasis should be placed on secondary road guide signing.

The previous sign policy was not uniformly enforced. Under a new, more flexible approach policy management should improve.

Special signs are not being used to their potential in the Province. Additional signs consistent with special advertising and promotional efforts of the Province could be used. Note however that whenever regional, scenic drive or some different set of signs are developed there are dangers of confusing the tourist or overdoing an idea through standardizing it.

Objectives

The objective of directional signs is to efficiently provide route information to the automobile travellers. The objective of information signs is to lead the traveller to services and facilities which will satisfy his needs and increase his length of stay. The objective of special signs should be to identify a highlight of significant interest to the travelling public.

Recommendations

Greater emphasis should be placed on guide signing along collector and local highways.

The modified sign program for provision of commercial advertising along the Province's highways must be uniformly enforced.

Signs should be erected at the major points of entry to each of the Province's five tourists regions to tie into other promotion efforts. No special signs should be designated or established for a system of scenic drives.

Consideration should be given to the use of various types of billboards as a promotional tool outside of New Brunswick.

CHAPTER 7
PROGRAMS AFFECTING SUPPLY

7.1 Introduction - Framework

It is not enough to increase the marketing efforts to stimulate the demand for tourism in New Brunswick. Ultimately, the visitor must be supplied with a good quality experience at the right price or any gains made by advertising etc., will be shortlived.

Additional attraction development and improvement in the quality of supply while maintaining competitive price levels are both priority objectives of this strategy. Lesser emphasis is placed on programs which seek mainly to increase the quantity of services.

While there are various programs of Tourism New Brunswick and other government departments that affect the supply side of the industry, the ownership of and responsibility for most of the plant lies with the industry itself. Beyond government, improvements in the supply side will depend entirely on private sector initiative. Both the public and private sectors must recognize and accept their respective roles. The private sector has final responsibility for seeking out opportunities and for developing attractions, accommodations and other services. Business must continue to invest in their own facilities from which they ultimately profit.

Nonetheless there are several government programs which significantly affect the supply side of the industry and they are grouped as follows:

- the direct provision of supply by government
- the provision of government assistance to private enterprise
- the establishment of standards affecting supply

Government sponsored plant initiatives include the park and transportation systems. Assistance to private enterprise is generally in the form of financial, technical or training assistance. Standards includes accommodation inspection and other monitoring functions.

7.2 Park System

Background

Parks are an important part of the tourism industry for both residents and non-residents. In addition to fulfilling recreational needs, parks can serve as an attraction to visitors. Major parks can stimulate development of the industry and have significant economic impact on the area in which they are located.

Tourism New Brunswick operated 58 parks in 1981 ranging from small roadside picnicking and rest areas to large multi-use recreational parks offering a variety of activities and facilities. Federally, Parks Canada, through the operation of Fundy and Kouchibouguac National Parks has a major presence in the industry. Municipal parks and private campgrounds and recreational facilities complete the picture.

Each of these groups is involved in the industry in a different way depending mainly on who they are trying to serve and to what end. The primary objective may be either social or economic and the user may be a local resident or a non-resident. See Diagram 7.1.

Analysis

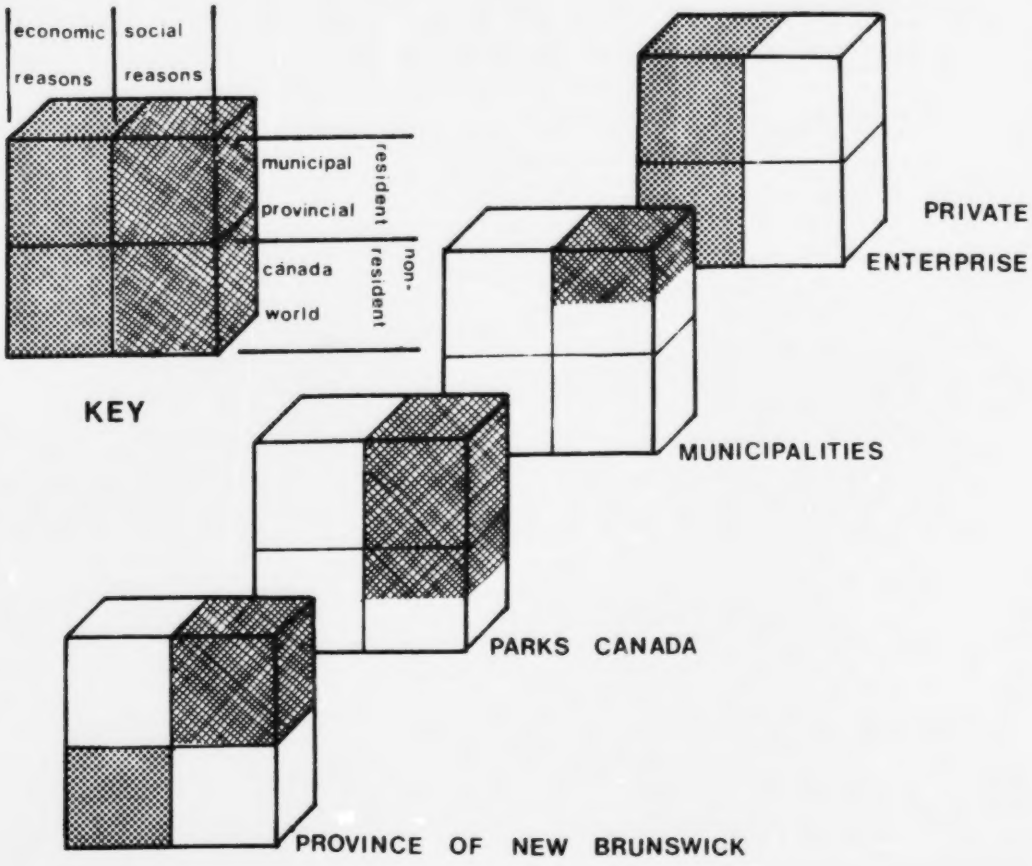
From the diagram it is obvious that there is some considerable degree of overlap in the provision of recreational facilities in the Province. However the detailed roles of each participant have not been clearly defined or related to one another in a parks system plan.

The preparation of a comprehensive park system plan would set out clearly a framework for orderly and coordinated park development at all levels of involvement (federal, provincial, municipal and private). The plan would take into account future conditions and demand and recommend modifications where necessary.

For fiscal 1981-1982, in ordinary account expenditures by Tourism New Brunswick, over $4.9 million (47% of budget), was allocated to operation of Provincial Parks. In keeping with new facilities which have begun operation or have been expanded, large portions of the Department's budget have had to be allocated for park purposes. This obviously constrains the Department's ability to undertake other important initiatives.

DIAGRAM 7.1: PARK SYSTEM IN NEW BRUNSWICK

Provider	Reason	User
Tourism New Brunswick	social	resident of New Brunswick
Tourism New Brunswick	economic	non-resident of New Brunswick
Natural Resources	social	resident of New Brunswick
Youth, Recreation and Cultural Resources	social	resident of New Brunswick
Parks Canada	social	resident of Canada
Municipal Park	social	resident of municipality
Private Enterprise	economic	both resident & non-resident



With respect to economic development it is most unlikely that any Provincial Park can make a profit directly even if capital development costs are discounted. Certain of these parks are only justified economically on the grounds that they are the nucleus around which other profitable operations developed. Such parks can help to stimulate demand by being a key attraction if they are

(a) in the right location and

(b) have services and facilities with high public appeal.

Objectives

The objective for this program is "to provide a system of provincial parks for the economic and social benefits of New Brunswick citizens".[1]

Recommendations

It is recommended that the Department prepare immediately a park system plan to rationalize current parks and to provide guidance for the future. The plan will recommend changes in the system over time reflecting amongst other things

- changes in travel patterns.
- changes in consumer tastes and recreational needs.

[1] Departmental Manual p. 201-4

- improved cost, revenue and use of each park.
- provision of park services by others in New Brunswick.
- alternate methods of financing.
- land acquisition.
- future development concepts.

In the development of a park system plan for the Province it is imperative that serious consideration be given the regional park concept which could

- result in greater cost efficiency,
- provide better recreation to its citizens per unit of cost.
- support regional images and marketing efforts directed at the stimulation of demand from non-residents.

It is also recommended that consideration in the plan be given to the question of overnight camping accommodation within provincial parks as opposed to private parks.

The current policy of concessions and leases within provincial parks is desirable and should continue provided a reasonable standard is maintained which is consistent with the concept, theme or image of the park. This also offers the dual advantage of providing employment not subsidized by taxes and of reducing government's operating deficit.

7.3 Transportation System

Background

The transportation system refers to all means of tourist travel from home to destination. The purpose of this section is to make recommendations on the development of the transportation system in so far as it affects the tourism industry.

Analysis

Travel by rail into and within New Brunswick dropped to a very low level but is recently increasing appreciably. VIA Rail offers potential for future development, especially as concerns package vacations.

The absence of an international gateway (with full customs facilities) in New Brunswick remains a major constraint to growth in air travel. Continued effort should be made towards the development of a scheduled New Brunswick - New England air service capable of becoming part of a fly/drive or fly/bus package. The development of fly/drive and fly/bus links with Bangor has proven successful on an experimental basis.

The highway system and changes in it will have the most impact on tourism. Improvements in Route 11 support efforts to establish the east coast and the Acadien Peninsula as tourist destinations.

Significant growth in the tour bus market has been experienced in recent years and is expected to continue. Recent plant improvements in areas such as the Gloucester Peninsula offer growth potential provided attractive and diversified tour packages are developed and actively marketed.

Fly-bus tours for the American market operating through Bangor currently circumvent the deficiency in customs clearance and scheduled air service. These buses, entering the Province in the same manner as other bus tours, clear customs at existing border entry points. This however should be considered only a stop-gap measure.

Objective

The objective of the transportation system is to move users to their destinations in a safe, economical and convenient manner. In addition to this, the Department of Tourism attempts to ensure that tourist needs are considered in all components of the system.

Recommendations

Tourism New Brunswick should press for stronger co-operation with the Department of Transportation and other relevant agencies in an effort to improve the transportation system to and within the Province.

Tourism New Brunswick should continue to push for provision of an international gateway at one of the Province's major airports. The provision of a scheduled air link with the U.S. should be actively pursued.

While not primarily related to transportation it is recommended that packages for fly/drive and other modes of travel to and within the Province should be developed to facilitate the tourist's planning and to increase length of stay. Greater effort should also be directed to resident-in-province tour packages for such purposes as ski weekends, etc.

7.4 Attractions Development

Background

A number of studies have recommended many attractions for development. This section places the general development of attractions within the concepts of the overall strategy and makes recommendations on specific attractions which should be pursued.

The role of government may consist of:

- complete ownership and operation
- financial assistance
- technical assistance
- minimal involvement of a promotional nature

Government operated attractions include parks, historic villages and museums. Financial assistance has been offered to private sector attraction proposals under the finanical incentives program. Technical assistance includes advice on markets, management and construction. Assistance of a promotional nature consists of (a) general provincial advertising and (b) distribution of literature relating to specific attractions.

Analysis

Quality attractions are fundamental to a healthy tourism industry. They are the main reason for pleasure travel. While individual attractions may not alone create their own demand, sufficient attraction development of a good quality will collectively alter travel patterns. As a group they form the image of an area.

Most major man-made attractions in New Brunswick have been created through government funding--National Parks, Mactaquac, Kings Landing, etc. Others are a product of nature, eg., Fundy Tides. Current private developments are typically small and located without a clearly perceived and accepted plan of developing an area or image.

For the future, the private sector must place a high priority on the development of quality attractions which complement the Provincial promotional effort and around which further private sector service development can occur. Government has a role to play in being responsive to private sector initiatives as well as undertaking opportunity searches for possible new attraction developments.

Objective

To ensure the development of high quality attractions in New Brunswick as a means of increasing tourist demand.

Recommendations

The maximum impact of attractions development will be achieved only if they are grouped together in area and image to complement the marketing effort. As a group they are easily marketable and are clearly identifiable as a destination area by the tourist. Government support for various projects should therefore be strongly influenced by their location in destination areas and by the theme of each as it relates to the image of the region in which it is located. The quality of the project as well as its anticipated viability are of course equally important factors.

In keeping with the foregoing, several priority government initiatives are recommended for immediate action:

Greater emphasis should be placed on east coast beaches and Parlee in particular should be completed as the Province's showcase beach. Where possible, beach resources should be acquired at other east coast locations to satisfy growing future demand by both active and passive oriented visitors.

Support for historical development of the St. Andrew's area should receive a high priority. The emphasis should be on maintaining the character of the town but potential to capitalize on Minister's Island should be explored.

A marine national park in the Fundy Isles area scores highly in regards to location, compatibity with image and significance. Depending on support for such a concept from the local residents, the Province should actively pursue this concept with Parks Canada.

The tourism plan for Northwestern New Brunswick has recommended a development centered around the Grand Falls gorge. With the exception of the activity centre this development should be completed within the time period of the strategy.

Development of Mount Carleton should be pursued as a wilderness park with primitive type facilities consistent with its location and the outdoor recreation images of the Restigouche region.

As a fundamental premise all proposed developments must be assessed realistically both in regard to the cost of construction and the cost of operation in the long-term. New provincial park development which would increase the current operational deficit or add to staff man-year requirements are simply not possible under current fiscal conditions. Given the ongoing climate of fiscal constraint only those projects

which have a minimal effect on Departmental man-years and operating costs should be implemented. It is recommended that future provincial support be largely in the form of increased financial and technical assistance to private enterprise initiatives. Since such projects tend to be small to medium sized it is especially important that they be concentrated in destination areas for the synergy effect.

A data bank on attractions (and special events) must be established. An automated storage retrival system with written descriptions of the specific attractions and events offers the required flexibility of producing information by various characteristics. Certain users would require information on a particular area; others, on a particular type of facility; still others, on dates of operation. Tourism New Brunswick should organize and maintain this information system.

7.5 Financial Assistance

Background

The provision of financial assistance to the New Brunswick Tourism industry has been recognized by the Department as a desirable and necessary means of stimulating coordinated and orderly growth in the provincial plant where opportunities are identified.

Financial incentives through the private sector have stimulated increased private investment in selected tourist facilities through the Province under the Canada - New Brunswick Tourism Subsidiary Agreement.

The program had two distinct components. The first referred to as the Tourism Incentives Program provided interest free forgivable loans to the industry for

- new year-round accommodations operations over 20 units
- new seasonal accommodations operations over 15 units
- expansions of existing accommodations operations by over 10 units
- attractions

The minimum approved capital cost of a facility was set at $50,000 and the maximum amount of financial assistance was $300,000.

The second component, referred to as the Tourism Upgrading Program, was added with the extension of the Tourism Subsidiary Agreement to 1980. This effort was directed towards the upgrading of existing facilities and offered assistance under several packages such as for attractions, campgrounds, host farms, landscaping, recreation and others.

As in the previous case the assistance was in the form of interest free forgivable loans with a minimum approved capital cost of $5,000 and a maximum amount of financial assistance of $30,000. Within these limits the

assistance provided was 40% of the approved capital cost.

Analysis

The Accommodations Requirement Study identified a number of crucial gaps in accommodations supply in the Province. The financial incentives program assisted in closing some of those gaps, particularly in the supply of quality year round units. The program has been less successful, however in the stimulation of investment in seasonal units. Indications are that private lenders' high perception of risk were not totally dispelled by the existence of government sponsored financial assistance.

Current indications are that certain areas with medium to high potential for additional accommodation facilities continue to exist. In particular, additional seasonal units are required in various locations throughout the Province especially along the coastal areas. The need for additional year around units is limited to a few specific areas as the demand has largely been met.

<u>High quality private sector attractions development, continues to be slow and represents a serious growth constraint.</u>

Objective

The objective is "to stimulate the development of facilities by the private sector through financial incentives

in areas where such developments are consistent with the tourism development strategy and would not be developed by the private sector unassisted".[1]

Recommendations

While the financial incentives programs are not currently available due to the expiration of the Tourism Subsidiary Agreement, they are considered highly desirable for the future and new funding should be sought.

In accordance with the overall demand/supply situation financial assistance in the future should continue to be offered only where there is a clearly identified lack of tourist services constraining the growth of the industry.

Because the financial incentives program has been less successful in filling the gap in seasonal accommodation and because of the low profitability inherent in seasonal enterprises it is recommended that the levels of assistance provided for this type of accommodation in any future programs be reconsidered with a view to increasing them to a more effective rate.

The extension of the financial incentives program to include an upgrading component was a positive step and must be continued in the future. The shift in emphasis towards an increased quality of supply is the type of effort which must be strongly encouraged.

Increased emphasis must be placed on the creation of high quality attractions by the private sector. The recommended readjustment of assistance levels to seasonal accommodations must also apply to attractions.

[1] Canada - New Brunswick Tourism Subsidiary Agreement.

A greater effort will be made to inform private enterprise of tourism related development opportunities. The Department should prepare complete project packages for consideration by appropriate private sector investors from both within and outside the Province. Initiatives which support regional images and destination areas will be identified and made known to prospective investors in the same manner as other industrial development opportunities are pursued.

7.6 Technical Assistance

While technical assistance has been provided by the Department in the past, the emergence of the tourism industry as a highly competitive and sophisticated economic entity has placed a heavier demand on the operator to keep pace with (a) new and changing technologies (b) a demand for increased managerial skills (c) a wider and ever changing range of market and product information and (d) increasingly complex system of regulatory requirements.

Current advice and counselling provided by the Department includes:

- manuals on campground and low cost seasonal accommodation development.
- various other handbooks federally produced.
- professional advice on landscaping, architecture, engineering and campground planning.
- assistance in designing and distributing promotional literature.
- provision of available research data.
- seminars on topical subjects.

The information and assistance is quite adequate for the subjects it covers. There is, however, a gap in the financial, marketing, and economic aspects of industry development. There could be a need for departmental expertise in accounting and service operation (eg., hotels and restaurants) to provide technical assistance.

Applicants for financial assistance from either conventional or government lenders frequently are less than fully informed on types of assistance available and what regulations and acts will affect a potential tourist development. This is sometimes coupled with shortcomings in financial, marketing and general management skills.

Objective

The Department of Tourism should provide technical assistance in the form of advice and counselling to private industry to increase the quality and quantity of supply, with the emphasis on quality.

Recommendations

The prime thrust of the Department of Tourism's efforts in technical assistance should be to provide people with information particular to the tourism, parks and recreation sector. These and other peripheral fields should be dealt with through a centralized management assistance program which would:

- provide various forms of technical advice and

information drawn from expertise within the various branches of the Department.

- include advice on park and campground development, research data, overall industry forecasts, economic outlooks as they affect travel, accounting systems.
- include advice on all pertinant regulatory requirements and expediting of applications, where possible.
- refer applicants to other agencies who are more directly involved with certain types of assistance. These agencies include Community Colleges, Federal Business Development Bank, Department of Commerce and Development, industrial commissioners and various private consultants.

It should be clearly understood that these recommended government services are not intended to replace or compete with private consultants. Indeed, the use of private consultants would be encouraged.

7.7 Standards

Background

The accommodation inspection program operates to ensure that accommodation facilities in the Province are meeting at least the minimum regulations established under the Tourism Development Act. Each establishment is inspected at least once a year and these inspections are one criteria to be met before being listed in the accommodations booklet.

Analysis

The accommodation inspection program is the Department's first-line effort to insure that a standard quality of product is available to the tourist. In view of the fact that increased quality of supply is a first priority of the strategy the program must be treated as an essential tool in achieving that objective. Annual inspections are not sufficient to ensure that quality standards are being met and should be increased particularly for those establishments which have been identified as sub-standard or deficient.

Nonetheless the accommodation inspection program is intended only to ensure that all establishments meet minimum standards. There is, as well, a need for a rating system which can provide more information to the customer. Such systems have proven useful elsewhere in guiding tourists in their decisions.

Recommendations

Strict enforcement of the accommodation inspection program is recommended as extremely important with today's cost and quality conscious consumers.

The concept of an Atlantic Provinces accommodation rating system should be explored with the other Atlantic Provinces. Any rating system should be industry developed and operated.

7.8 Training

Background

Before 1975 the Province of New Brunswick had no programs or facilities for training people in the hospitality industry. Any training the staff had was either entirely on site through experience or self-taught. At that time funds

to assist the development of a hospitality training program were made available under the Canada - New Brunswick Tourism Subsidiary Agreement and directed through New Brunswick Community College.

The program involved two major aspects. The first was a mobile training van which provided on site training for those already employed in the industry. The second was a two year course of study at the Moncton campus of the New Brunswick Community College.

Analysis

Despite initial industry resistance, response to the van has been extremely positive. In fact establishments now are willing to let the staff teach in their own facilities instead of using the van. The van is currently being phased out because of the high cost of moving it from place to place and the industry's enthusiasm to conduct the training on site.

In 1981-82 the two year course was moved from Moncton to the facilities of the Community College and the Algonguin in St. Andrews and the course was modified to better meet the needs of industry. Although 80 percent of the graduates from Moncton who responded to surveys taken six months after their graduation indicated that they were employed in industry, they had been trained for jobs at the management level while the industry wanted to hire them at entry level positions and work their way up through the ranks. The new program stresses this concept of moving up through the ranks so that the the students can see their training in the proper perspective.

At the moment plans are underway for a similar program for the French-speaking sector to be offered at the Edmundston branch of the community college. The program will be very similar in content to its English counterpart in St. Andrews. The major difference is that new, specially designed facilities, including all types of equipment found in New Brunswick hotels, has been constructed at the Edmundston campus. This new facility is scheduled to begin full scale operation in September 1982.

In its relatively brief period of existence, training for the hospitality industry in New Brunswick has not been static but has been improved as industry needs were recognized. Some time is required to properly assess the recent changes to new campuses and the modified form of on-site training. Nonetheless it must be recognized that tourism is a major industry in all of the Atlantic Provinces and efforts to provide a comprehensive training program should be continued.

Objective

To improve the quality of supply by providing short periods of instruction to industry operators and employees at their location.

To raise the quality of supply by providing the types and amount of tourism training required to prepare people for productive employment in the tourism industry.

Recommendation

After the modifications in training have had sufficient time in operation, their performance should be assessed as part of a systematic monitoring and review to ensure that the training is meeting the changing needs of the industry.

CHAPTER 8
OTHER PROGRAMS

8.1 Industry Representation

Background

Although several organizations represent parts of the tourism industry no single organization in New Brunswick can claim to speak for a broad cross-section of the industry and to represent its entire interests.

Shortly after the creation of the Department of Tourism, a Tourism Advisory Council was established to consider and recommend to the Minister measures to enhance tourism development within the Province. The council, while composed of representatives from the industry and the general public appointed by the Minister, is not an industry organized and supported group.

Recently there has been an attempt to set up a Province wide organization embracing the entire industry. This group, known as Hospitality New Brunswick, is still largely limited to membership from roofed accommodation and restaurant operators. In addition several other organizations represent outfitters, private campground owners, farm vacations, etc. The industry still continues to be fragmented.

Analysis

An important factor contributing to the lack of a single representive organization for the industry is the

range and diversity within the industry. From accommodation establishments and attractions through gasoline stations and grocery stores, tourism affects many businesses to varying degrees. Accordingly it is more difficult to draw together a representative association in the tourism industry than in other more homogeneous industries.

Moreover, it is this very diversity of the industry which is the reason for establishing a unified comprehensive association which can speak with a single voice. In times of increasing demands for limited funds, an industry that can organize to lobby government for an agreed upon action has more chance of success than when there are several varying and occasionally conflicting recommendations coming from individual firms.

Government would be better informed of industry positions on various matters and probable reactions to various alternative government actions in taxation, regulation, or spending pattern, for examples.

Together an industry can muster the resources and people that businesses can not afford independently - to analyse various problems and to prepare briefs and recommendations. Even the larger firms would benefit by the pooling of funds and the avoidance of unnecessary research duplication. Moreover, a forum for the joint consideration of issues could shed new light or insight from the variety of experiences that would be represented there.

The sharing of knowledge is an advantage even if that knowledge is only shared within the industry association membership. An industry organization has a role to play as a self-help, self teaching mechanism. This can vary from seminars and newsletters to the simple establishment of contacts with fellow members having similar problems.

An industry association would not eliminate competition among individual entrepreneurs but it would help them to compete more effectively with those in other provinces where associations have been developed.

Objective

The objective of a provincial tourism industry association and Tourism New Brunswick are the same - to promote the development of a healthy and viable tourism industry in the Province.

Recommendations

Tourism New Brunswick should continue to support the concept of a single strong and representative industry association, to promote its development, to co-operate with it in joint ventures and to give serious consideration to its recommendations.

8.2 Awareness Program

Background

Since 1978 Tourism New Brunswick has operated an awareness program within the Province. Aimed at residents of New Brunswick it seeks to increase their awareness of the industry's value and to stimulate in-province travel. Over the years various elements of the program have included brochures, radio and newspaper advertising, mall displays and promotion work by Miss New Brunswick.

During 1980 an increased emphasis was placed on promoting travel in the Province by New Brunswicker's. Festivals and special events were highlighted as activities in which all could participate.

A special part of the awareness program has been that of "fair exchange" promoting the offering by provincial operators and merchants of a fair exchange rate for United States currency.

Analysis

The hospitality extended towards visitors by the general population and those employed in the industry has a

significant impact on the memories visitors take home. Favorable vacation memories have a positive impact on repeat visits.

This offering of hospitality by the general population towards visitors is contingent upon a number of factors. Three of those considered most important include:

- an understanding that the tourism industry is of significant economic importance to the Province.
- an understanding that the average person on the street can play a significant role in improving the Province's image through hospitality towards visitors.
- resident pride and enthusiasm in their province as a vacation destination.

Objective

To increase awareness in New Brunswick of the importance and impact of the tourism industry and the role played by the average citizen.

To improve the quality of the vacation experience supplied to visitors by enhancing the hospitality extended towards them.

To increase awareness by New Brunswicker's of this Province as an enjoyable vacation destination and thus increase in-Province travel.

Recommendations

The awareness program should be continued and expanded. Additional means of conveying the message might include interviews and presentations on local cable TV channels, newspaper columns, hospitality and special guest awards and presentations and materials to students in school.

Regardless of method, it is strongly recommended that increased emphasis be placed on making New Brunswickers aware of tourism's importance and of the benefits to be derived by all from simple expressions of hospitality.

8.3 Special Events

Background

The Department of Tourism currently offers a program to assist festival committees in organizing their programs and getting them operating. A great many festivals run by community committees are operating successfully throughout the Province.

The Department produces a calendar of special events which is one of basic literature pieces serving mail

and T.I.C. inquiries.

Analysis

The development and promotion of special events and attractions is of prime importance in increasing the length of stay in New Brunswick. In New Brunswick events tend to be much more heavily patronized by local residents than non-residents. This is not to deny their importance in influencing length of stay but rather to point out that this influence is temporary.

Objective

The objective of this program should be to assist in the development of special events by the provision of advice and counselling and to publish listings of special events which are current and complete.

Recommendations

No particular change is recommended in the Department's program of assisting and promoting special events.

Information on special events will be included in the data bank previously recommended for attractions, permitting rapid updating and retrieval.

CHAPTER 9
SUMMARY OF RECOMMENDATIONS

9.1 Explanation of Tables

The purpose of this chapter is to summarize in tables the various recommendations of the strategy.

The relationships which led from external factors affecting tourism through the formulation of objectives to the development of a set of recommendations are portrayed in in Diagram 9.1. It illustrates, for example, that the problem of lack of an image underlies the objective of increasing the quantity of demand. From this flows recommendations for increasing marketing efforts, for support of attraction development and for improvements in the quality of supply relative to price.

The accompanying summary of recommendations (Diagram 9.2) abbreviates and lists all recommendations, keys them to page numbers in the report and relates them to the strategy objectives on which they will have an obvious impact. The purpose of this table is to facilitate a comparative examination of the recommendations within the framework of established strategy objectives. In this manner it is possible to priorize the recommendations for implementation.

Diagram 9.1 Problems/Objectives/Recommendations

EXTERNAL FACTORS AFFECTING TOURISM	ADDITIONAL ISSUES AND CONCERNS	STRATEGY OBJECTIVES	MAJOR RECOMMENDATIONS
ENERGY depressed demand	Underdeveloped image Undefined destination areas	Direct stimulation of demand	Increased marketing efforts, attraction development and quality of supply.
ECONOMY slower growth in demand	Seasonality	Increase plant quality	Increased training, technical and financial assistance. Park system plan.
POLITICAL FACTORS uncertain direction of impact on demand	Transportation system Poor price/ quality ratio	More attractions	Support attraction development; specified and general.
POPULATION varied but modest impacts on demand	Resident-visitor conflicts		
CHANGING VALUES increased demand for quality	Land availability Low cost accommo-dation	Growth in services (where needed)	Selective financial and technical assistance.

DIAGRAM 9.2 SUMMARY OF RECOMMENDATIONS

ABBREVIATED RECOMMENDATIONS	PAGE	RELATED TO OBJECTIVES: STIMULATE DEMAND	INCREASE QUALITY	MORE ATTRACTIONS	MORE SERVICES
ESSENTIAL TO ALL EFFORTS					
Implement destination area approach	5-6	X	X	X	X
MARKET RESEARCH					
Continue emphasis on market research	6-5	X			
Match regional images with specific market area preferences	6-5	X			
Establish annual market priorities and objectives	6-5	X			
Prepare multi-year market strategy	6-5	X			
ADVERTISING					
Increase U.S.A. advertising	6-8	X			
Develop co-operative advertising with private sector	6-8	X			
Base advertising program on market plan priorities	6-8	X			
TRAVEL TRADE DEVELOPMENT					
Set objectives for identified package tour opportunities	6-12	X			
Continue emphasis on auto traveller including package tours	6-12	X			

ABBREVIATED RECOMMENDATIONS	PAGE	RELATED TO OBJECTIVES: STIMULATE DEMAND	INCREASE QUALITY	MORE ATTRACTIONS	MORE SERVICES
TELEPHONE INFORMATION/ RESERVATION					
Explore microfilm as tool for telephone inquiries	6-13	X			
Restrict reservation system to Dial-A-Nite	6-14	X			
LITERATURE					
Base literature program on market plan priorities	6-16	X			
Adopt detailed multi-year printing budget	6-16	X			
Emphasize destination areas in literature	6-16	X			
Retain "New Brunswick Is" and modify as required	6-16	X			
Emphasize regional images in literature	6-17	X			
Continue editorial services	6-17	X			
TOURIST INFORMATION CENTRES					
Prepare tourist information centre (T.I.C.) system plan	6-19	X			
Utilize sales oriented approach in T.I.C.'s	6-19	X			
Establish measurable T.I.C. sales objectives	6-19	X			

ABBREVIATED RECOMMENDATIONS	PAGE	RELATED TO OBJECTIVES: STIMULATE DEMAND	INCREASE QUALITY	MORE ATTRACTIONS	MORE SERVICES
Reconsider policy respecting different levels of T.I.C.'s	6-20	X			
SIGNS					
Improve guide signing on collector and local highways	6-22	X			
Enforce modified sign program uniformly	6-23	X			
Erect entry signs at major regional entry points	6-23	X			
Consider various types of billboards outside New Brunswick	6-23	X			
PARK SYSTEM					
Prepare immediately a park system plan	7-5	X	X		
Seriously consider regional park concept	7-6	X	X		
Re-evaluate government provision of overnight camping in Provincial Parks	7-6				
Continue policy of leases and concessions in parks	7-6				

ABBREVIATED RECOMMENDATIONS	PAGE	RELATED TO OBJECTIVES			
		STIMULATE DEMAND	INCREASE QUALITY	MORE ATTRACTIONS	MORE SERVICES
TRANSPORTATION SYSTEM					
Influence transportation system improvements through continued co-operation with Transportation New Brunswick	7-8		X		
Support development of N. B. International air gateway and scheduled air link with New England	7-9				X
Develop packages for fly/ drive and other modes of transportation	7-9	X		X	
Develop tour packages for residents	7-9	X		X	
ATTRACTION DEVELOPMENT					
Private sector must place high priority on attraction development	7-10			X	
Location and image should influence government support of private initiative	7-11		X	X	X
Emphasize east coast beach development	7-11			X	
Support historical development of St. Andrews area	7-12			X	
Pursue national marine park development	7-12			X	

ABBREVIATED RECOMMENDATIONS	PAGE	RELATED TO OBJECTIVES: STIMULATE DEMAND	INCREASE QUALITY	MORE ATTRACTIONS	MORE SERVICES
Develop Grand Falls gorge	7-12			X	
Develop Mt. Carleton as wilderness park	7-12		X		
Control capital and operating expenditures on new provincial park development	7-12				
Emphasize financial and technical assistance to private sector as alternatives to government development	7-13				
Establish attractions and special events data bank	7-13 8-7	X			
FINANCIAL ASSISTANCE					
Limit future financial assistance to areas of definite supply deficiencies	7-16				X
Increase financial assistance levels to seasonal accommodations	7-16				X
Continue to improve plant quality through upgrading incentives	7-16		X		
Increase financial assistance levels to attraction developments	7-16			X	
Identify and promote development opportunties to private sector	7-17			X	X

ABBREVIATED RECOMMENDATIONS	PAGE
TECHNICAL ASSISTANCE	
Provide centralized management assistance to private sector	7-
STANDARDS	
Strictly enforce accommodations inspection program	7
Explore concept of Atlantic Provinces accommodation rating system	
TRAINING	
Review modified campus and mobile training relative to industry needs	
INDUSTRIAL PRESENTATION	
Support development for strong and representative industry association	
AWARENESS PROGRAM	
Expand awareness program	

RELATED TO OBJECTIVES

	STIMULATE DEMAND	INCREASE QUALITY	MORE ATTRACTIONS	MORE SERVICES
8		X		
20				
-20		X		
7-23			X	
8-3			X	
8-6		X	X	

- NOTES -